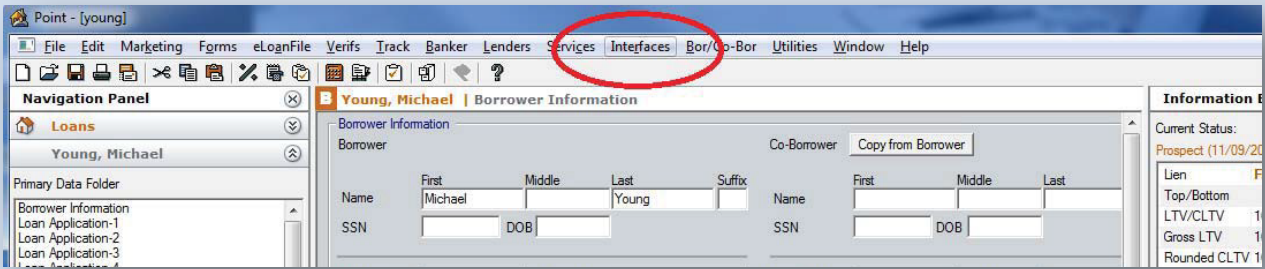




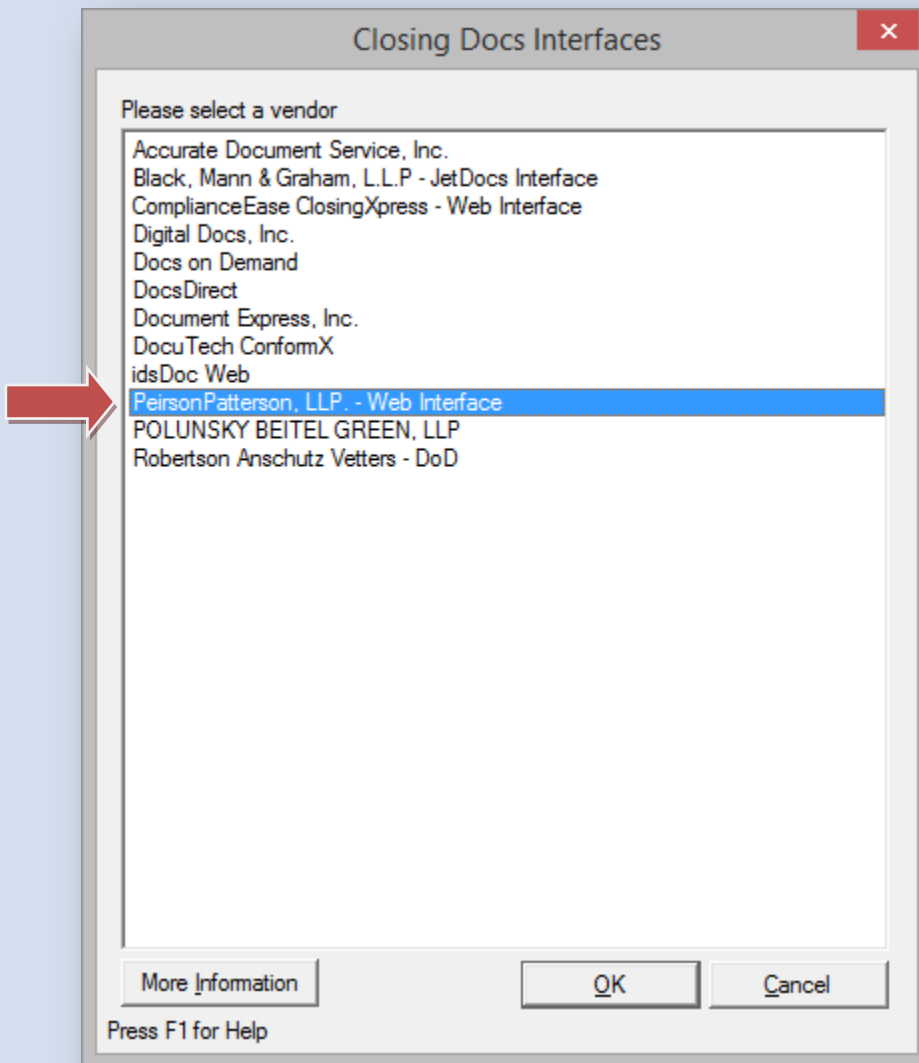
CALYX Import Guide

Step-by-Step Guide

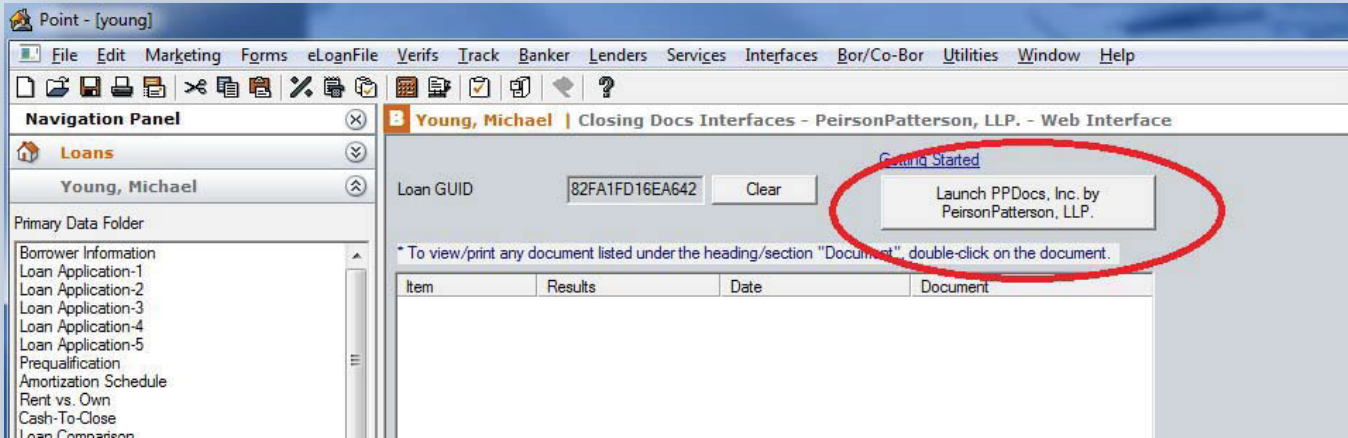
1. Open Calyx Point and when you are ready to submit your file click "Interfaces" then "Closing Docs" on the top menu bar



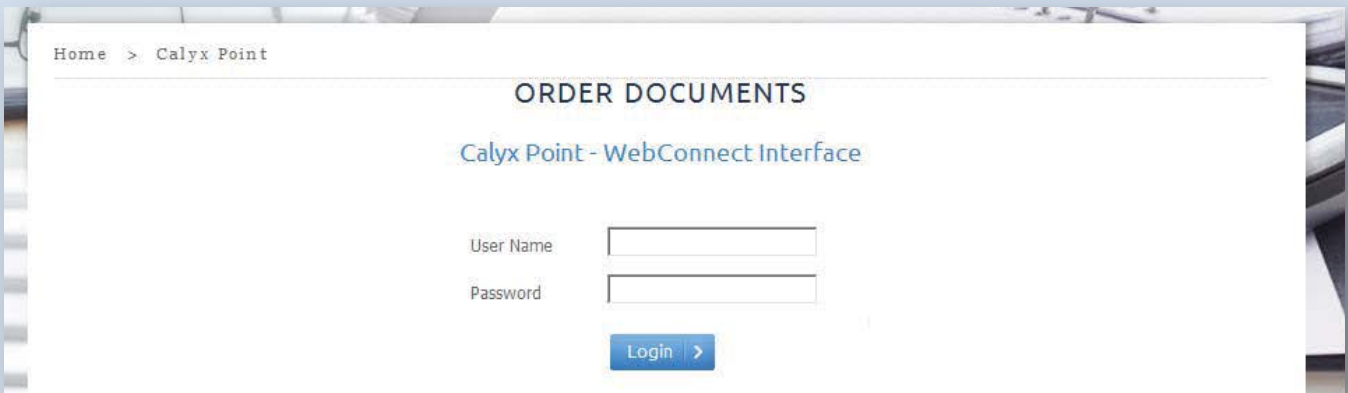
2. Select "PeirsonPatterson, LLP – Web Interface"



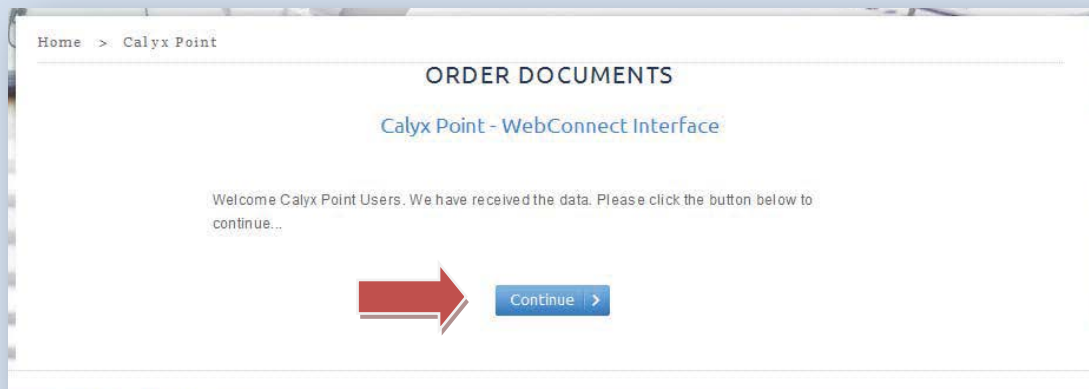
3. Click "Launch PeirsonPatterson, LLP"



4. Log in to your PPDocs account:




5. Click "Continue"



6. Select your Order Form from the Lists provided (This is customizable)

Select Order Form

Displaying order forms for TX. Other states are available.

 This list of order forms can be customized to suit your needs.

APPLICATION / PRE CLOSING ORDER FORMS



Initial Disclosures - RESPA ONLY NOT TRID

Initial Loan Disclosures required by TILA/Reg Z, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.



Initial Disclosures w/ Loan Estimate for TRID

Loan Estimate and other disclosures required by CFPB and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.



Aggregate Escrow Analysis

Calculations and forms to determine RESPA compliant starting balance for a loan closing.



Home Equity Line of Credit Disclosures

Home Equity Line of Credit Disclosures and other required documents.

SPECIALTY ORDER FORMS



Fannie Mae - Home Affordable Modification Program

Modify an existing loan. Cover letter and Modification Agreement. Use this order form for the Fannie Mae and Freddie Mac Streamline Modification Program.



Closing Disclosure ONLY for TRID

Closing Disclosure and other disclosures required by CFPB and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.



Loan Estimate ONLY for TRID

Loan Estimate, Identified Service Provider List, and addendum (if applicable)



Fannie Mae / Freddie Mac Workout Modifications

Modify an existing loan. Cover letter and Modification Agreement. Use this order form for the Fannie Mae and Freddie Mac Streamline Modification Program. (Under development)



Texas Attorney Legal Review

Upload Trust, POA, Corporate Resolution, Leasehold, or any legal instruments affecting title to Texas real property, including any deed, deed of trust, note, mortgage, and transfer or release of lien. Include any other documents that are to be recorded in the Texas Real Property Records.

CLOSING ORDER FORMS



Legal Documents Only

This package does not include a Closing Disclosure. Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.



Legal Documents with Closing Disclosure

Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.



Residential Mortgage

Conventional, FHA, VA or USDA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

7. Was an LE, GFE, or NONE provided?

What Form of Estimate Did You Provide?

For more information about TILA-RESPA integrated disclosures, Reg X, RESPA, and tools to determine whether your loan applies or not, visit our [Resource](#) page or check out the [FAQ](#) on our website. If you have further questions, please [contact us](#).

Loan Estimate TRID Integrated disclosure for applications submitted on or after October 3, 2015. See Coverage	Good Faith Estimate For mortgage loan applications submitted before October 3, 2015. See Coverage and FAQ	None For transactions not covered by RESPA or the TILA-RESPA integrated disclosure rules. See Examples
Select... >	Select... >	Select... >

8. Select **Full Service** or **Express Service** and click "**Order**"

Residential Mortgage

Conventional, FHA, VA or USDA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Select Service:

Full Svc.-Conventional, FHA, or VA Package (1st or 2nd Lien) - TRID	\$225.00	<input type="button" value="ORDER"/>
Express-Conventional, FHA, or VA Package - TRID	\$75.00	<input type="button" value="ORDER"/>

WHAT IS EXPRESS SERVICE?

PPDocs, Inc. will NOT inspect, review, or perform quality assurance. We will present you a list of possible documents for your transaction. You may modify the document selection as needed. You may request multiple redraws as needed. There are no redraw fees.

WHAT IS FULL SERVICE?

PPDocs, Inc. will perform quality control of data based on the information entered on these order forms and provided via fax. We will select required document as well as review title commitment and survey.

9. Select a **Profile** and **Template (if applicable)**, and then **“Start a new order”**

Select Default Data

Template:

Templates are files that contain data that is imported into your new order. This is designed to help save time when ordering documents that contain similar information to a template file. You can turn any order into a template. Templates are order form specific. If you do not wish to use a template select **** Blank Template ****.

ATTENTION: DO NOT USE TEMPLATES CREATED PRIOR TO JANUARY 1st, 2010 FOR LOANS REQUIRING THE NEW HUD-1. YOU MUST USE 2010 TEMPLATES TO ACCOMMODATE THE RECENT CHANGES TO RESPA.

Select template:

*** Blank Template * ▾**

Start a new order >

10. Click **“Open Order Form”** to finish inputting your data and submit your order

Selected Product

Initial Disclosures w/ Loan Estimate for TRID [\(Change product...\)](#)

Loan Estimate and other disclosures required by CFPB and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.

Service type: Express
Fee: \$25.00

Open Order Form >

Import Data >

Export Data >

View Data >

Compliance Cert >

Clone Order >

Create Template >

Send Copy >

Archive Order >

Register Min # >