

2023 Nortridge User Meeting - Agenda

(Topics, times and presenters subject to change) - Updated Sep 15, 2023

Monday, September 18			
7:30 PM	9:00 PM	Welcome Cocktail Party	Hilton
Tuesday, September 19			
7:30 AM	8:45 AM	Registration and Buffet Breakfast	Foyer and Emerald Bay
9:00 AM	10:00 AM	Welcome & Opening Session	Pacific 1-2
10:15 AM	11:15 AM	Breakout Session #1	
<p><u>The Importance of Setup - Part 1</u> Designed for: New Users Presenter: Amy Sharma</p> <p><i>One of the most essential parts of a successful implementation of NLS is a solid setup. The initial configuration of setup will provide for security, proper accounting and reporting as well as the automation of key features you will use in NLS.</i></p>			
<p><u>Introducing Web-Based Loan Origination</u> Designed for: All Users Presenters: Diane Olsen and Bret Davis</p> <p><i>For years, our users (and prospects) have been asking for a single system for both origination and servicing. We're excited to provide such a solution with our new web-based loan originations. See this demonstration of features and look at the future roadmap.</i></p>			
<p><u>Automation & Integration - Part 1</u> Designed for: Technical Users Presenters: Jim Balint and Zac Stahl</p> <p><i>If you're new to interfacing with NLS, attend this session to get started with moving data into NLS (using XML imports), getting data out of NLS (via SQL queries), and an introduction to scripting for automation.</i></p>			
<p><u>New NLS Features</u> Designed for: All Users Presenter: Robert Buskirk</p> <p><i>In this popular session, see highlights of the many new features and enhancements incorporated into NLS during the last year, including an update on the new web client features for loan servicing.</i></p>			
11:15 AM	11:30 AM	Coffee Break	Foyer

11:30 AM	12:30 PM	Breakout Session # 2	
<p><u>The Importance of Setup - Part 2</u> Designed for: New Users Presenter: Robert Buskirk</p> <p><i>Setup is a BIG topic. This Part 2 session is a continuation of how to configure the setup of NLS to provide for proper accounting and reporting as well as the automation of key features you will use in NLS. There will also be time for questions and answers.</i></p>			
<p><u>Using Workflow to Stay Compliant</u> Designed for: All User Presenter: Aaron Abrams</p> <p><i>Walk through an example of creating a SRCA workflow to automate this important task and maintain compliance. These same task manager and workflow tools can be used to control important events such as repo, deficiency judgements, write-offs, excess payments, complaint escalation, refunds and much more.</i></p>			
<p><u>Open Technology Workshop 1</u> Designed for: Technical Users Presenter: Jim Balint & Nortridge Consulting Developers</p> <p><i>Here is your opportunity to ask questions and discuss technology in NLS with the Nortridge developers.</i></p>			
<p><u>Using NLS Services to Automate Routine Tasks</u> Designed for: All Users Presenter: Amy Sharma</p> <p><i>You can save so much time by using NLS Services to automate processes such as accruals, reports, statements, campaigns, ACH, ACH disbursement, credit bureau reporting, credit card processing, bankruptcy, credit bureau disputes and archiving. Come learn about the areas of automation that are beneficial and applicable to most NLS users.</i></p>			
12:30 PM	1:30 PM	Buffet Lunch	
		Emerald Bay	
1:30 PM	3:00 PM	<p>Industry-Specific Discussions <i>Join others from your same lending industry to learn from each other about how you use NLS and how you've overcome specific challenges.</i></p>	
		Locations TBD	
3:00 PM	3:15 PM	Afternoon Break	
		Foyer	
3:15 PM	4:30 PM	<p>General Session - Panel Discussion <i>Brace for Impact: Consumer Lending Market Analysis through a Legal and Compliance Lens</i></p>	
		Pacific 1-2	
4:30 PM	5:30 PM	<p>Quality Time with NLS Staff <i>Drop into designated areas for casual conversation with the Nortridge team.</i></p>	
		Locations TBD	
5:45 PM	6:30 PM	Shuttles Depart for Orange Hill	
6:00 PM	10:00 PM	<p>Cocktails & Dinner Shuttles depart at 5:45, 6 and 6:15 Return shuttles at approx. 8:30, 8:45, 9 and 9:30</p>	
		Orange Hill	

Wednesday, September 20

8:00 AM

9:30 AM

Roundtable Breakfast

Pacific 1-2

9:45 AM

10:45 AM

Breakout Session #3

The Complete Guide to Reporting in NLS

Designed for: All Users
Presenter: Rich Robbins

With more than 190 standard reports and thousands of ways to filter, sort, group, select monetary and date ranges (and much more), reports can be configured for everyone's specific data analysis needs. Learn how to configure, schedule and update the reports needed for your business requirements. Examples using Trial Balances, Collections, Transactions, Tax Forms and how to use the powerful Nortridge Loan Report Builder will be provided.

Automation & Integration - Part 2

Designed for: Advanced Technical Users
Presenters: Jim Balint
and Zac Stahl

This session offers a "deep dive" on advanced NLS schema topics-specifically related to Payment and Transaction History including advanced scripting, advanced SQL query development and review of task relationship schema.

Using the NLS Collection Module to Better Service Loans, Improve Productivity and Increase Collections

Designed for: All Users
Presenter: Aaron Abrams

Learn tips, tricks, and essentials of collections in NLS, including how to create collection queues.

Maximizing the Use of Status Codes and Rules

Designed for: All Users
Presenter: Robert Buskirk

Status codes can change behavior of how a loan works, disabling certain processes, how payments are applied, and even how a loan reports to the credit bureau. You'll also learn how to use rules to automatically change a status.

Small Group Discussion - Borrower Portal

Designed for: All Users
Host: Steve Leathem

Here is your opportunity to see a demonstration of the self-service borrower portal and ask questions about the latest developments and future direction of this increasingly important offering to your borrowers.

11:00 AM

12:00 PM

Breakout Session #4Non-Accrual and Charge Off Accounting

Designed for: All Users

Presenter: Aaron Abrams

Learn about the special accounting features and how to set them up in NLS for non-accrual and charged off loans. Also see the rules to automatically move a loan status to non-accrual and charge off.

Open Technology Workshop 2

Designed for: Technical Users

Presenters: Jim Balint & Nortridge Developers

Here is your second and last opportunity to ask questions and discuss technology in NLS with the Nortridge developers.

New NLS Features (repeat of Tuesday's session)

Designed for: All Users

Presenter: Robert Buskirk

If you missed yesterday's session, now's your chance to see highlights of the many new features and enhancements incorporated into NLS during the last year, including an update on the new web client features for loan servicing.

Instant Payments: Why Are They So Important

Designed for: Consumer and Auto Lenders

Presenter: James Price, VP of Sales, REPAY

Consumers are continuously seeking quicker and easier ways to pay. Learn how lenders benefit from faster, integrated payment solutions that meet customer demand and increase on-time payment. Lenders can even perform money movement without leaving the NLS system.

Small Group Discussion - Hosting Solutions

Designed for: All Users

Presentert: Matt Smith

In this informal session, and back by popular demand, Nortridge director of IT will answer your questions about the differences between a multi-tenant and private cloud environment and which is best for your organization.

11:45 AM

1:30 PM

Networking and Buffet Lunch

Pacific 1-2

2:00 PM

Shuttle departs for K1 Speed

2:30 PM

5:00 PM

Networking and Racing at K1 Speed*Optional activity - limited space*

K1 Speed Irvine

5:15 PM

Shuttle arrives back at Hotel

Hilton

Event Concludes