

Creating a Retention Grant

The UW-La Crosse Experience

April 12, 2023

About You

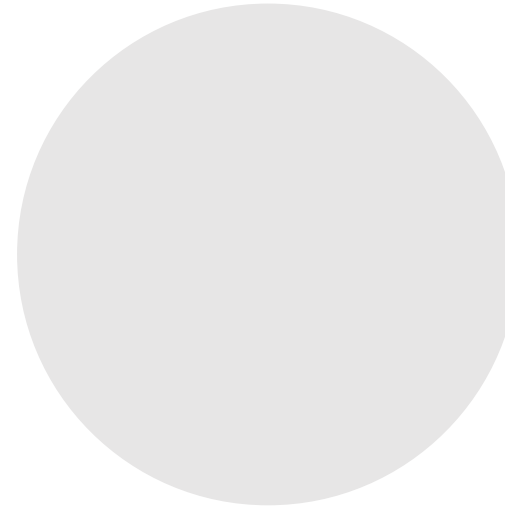


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University of Wisconsin – La Crosse

- Public institution
- Total Enrollment: 10,302
 - 9,374 Undergrads
 - 928 Graduates
- 79% Wisconsin residents (36 states, 30 countries)

Creating a Retention Grant

This is the UW-La Crosse experience.

We are often tweaking our process.

Make this process your own

Creating a Retention Grant

How did it all start?

Spring 2012, we had \$53,450 in unspent funds

We created a committee to decide how best to spend it

We determined that we wanted to assist students with outstanding balance so they can register on time

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What to call the new grant?

School colors are maroon and gray

Paying balances takes a student from in the red to in the black

Maroon to Gray Grant (M2G for short)

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Who would be eligible for the new grant?

- * **Students with an outstanding balance greater than \$100**
- * **EFC less than Cost of Attendance**
- * **Students must also:**
 - **be meeting SAP**
 - **have accepted all offered aid**
 - **have all of that aid disbursed**
 - **not have received a refund greater than due amount**
 - **be planning on returning to UWL the next term**

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Would we cover all charges?

Items that would not be covered:

- Textbook fines/damages
- Alcohol/Res Hall damage charges
- Athletic charges for Tryout/Roster Fees, trips
- Campus Cash greater than \$50

(Students can purchase Campus Cash to use in any area of campus (laundry, printing, food, etc) and the purchase is added to their university bill)

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No one would receive less than \$100

No one would receive more than \$6000

Originally, students were only eligible to receive the grant once

Later, it was changed to \$6000 cumulative

Every semester, we had funding from various sources

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It's important to understand the eligibility for every program you might use in the retention grant process.

At UWL, we regularly use the following funds for our M2G program:

- FFWS Stipend (WI resident w/need from a public high school, not receiving FFWS)**
- SEOG (Pell eligible, \$4000 annual limit)**

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- **Lawton Grant (institutional guidelines, \$4000 annual limit, \$16,000 lifetime limit)**
- **TAG (WI resident with financial need)**
- **UWL Institutional Grant (no limiting eligibility criteria)**
- **Unused Admissions scholarship funds**
- **Unused Institutional non-resident scholarships/grants (non-residents with need)**

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Sometimes we get access to other funds that we can use for M2G including:

- UWSA Grant (no limiting eligibility criteria)**
- HEERF III funds (Written permission from the student to use funds to pay balances)**
- Outcomes based funding (WI residents with financial need)**
- Emergency SEOG (Title IV eligible students, max amount = maximum Pell grant)**
- Donations from Dean's Offices/Foundation (no limiting eligibility criteria)**

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**Some of the types of aid require a unique Item Type
- i.e. We have a TAG Item Type and a M2G TAG Item Type**

While only a certain group of students actually receive the Maroon to Gray Grant, we use the Maroon to Gray (M2G) term to include all types of aid awarded through this process.

Once we know which programs we have available and how much we have to spend in each, we begin looking at individuals to identify eligible students.

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What is our process once we know how much funding we have for each of the various types of aid?

We have a query that identifies undergraduates who:

- Have filed a FAFSA**
- Have an EFC less than COA**
- Meet SAP**
- Owe a balance of at least \$100**
- Have completed all required checklists**
- Are US Citizens**

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The query has a prompt for:

Aid Year

Current Term

Upcoming Term

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The query has the following in the output:

- **Student ID**
- **Last Name**
- **First Name**
- **Yes/No to receiving previous M2G (are they in the M2G student group?)**
- **Residency**
- **Amount Owed**

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- **Year in School**
- **Y or N, are they meeting SAP**
- **Undergrad GPA**
- **Number of credits for the current semester**
- **Expected graduation term**
- **EFC**
- **COA**
- **Email Address**

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- **Cell phone number**
- **Ethnicity**
- **Cumulative credits**
- **Scheduled registration date**
- **Number of credits for the upcoming term**

- **I use the output from this query as my master spreadsheet**

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| 1 | | | | | | | | | | | | | | | |
|----|----------------|-------|-----------|---------|---------------|-----|------|-----|---------|-------|-------|--------------------------|------|------------|-------------|
| 2 | get_first_name | FMTG? | Residency | Balance | Year In Schol | SAI | UGRA | Cre | Exp Gra | EFC | COA | Ethnicity | Cumu | Start Date | Credit Load |
| 3 | Jack | No | Wisconsin | 2305.10 | Freshman | Y | | 12 | | 4336 | 9232 | White | 13 | 4/26/2023 | 0 |
| 4 | Grace | No | Wisconsin | 300.00 | Sophomore | Y | 2.22 | 13 | | 14089 | 18464 | White | 52 | 4/13/2023 | 0 |
| 5 | Kyle | No | Wisconsin | 315.46 | Junior | W | 1.93 | 16 | | 16020 | 18464 | Mexican, Hispanic, White | 86 | 4/10/2023 | 0 |
| 6 | Gabe | No | Wisconsin | 131.00 | Sophomore | Y | 3.36 | 12 | | 5804 | 18464 | White | 57 | 4/12/2023 | 0 |
| 7 | Aidan | No | Wisconsin | 625.00 | Freshman | Y | 3.36 | 17 | | 9444 | 18464 | Oth Asian, White | 12 | 4/26/2023 | 0 |
| 8 | Tyler | Yes | Wisconsin | 205.00 | Sophomore | Y | 3.25 | 13 | | 0 | 18464 | White | 47 | 4/14/2023 | 0 |
| 9 | Grace | No | Wisconsin | 192.00 | Sophomore | Y | 3.12 | 15 | | 6252 | 18464 | White | 59 | 4/12/2023 | 0 |
| 10 | Ashlyn | No | Minnesota | 125.00 | Freshman | Y | 3.46 | 15 | | 3342 | 19146 | White | 24 | 4/18/2023 | 0 |
| 11 | Sara | Yes | Non-Res | 378.60 | Sophomore | Y | 2.73 | 14 | | 17694 | 28171 | White | 52 | 4/13/2023 | 0 |
| 12 | Tristan | Yes | Wisconsin | 2978.93 | Freshman | Y | 2.15 | 13 | | 0 | 18464 | Am Indian | 14 | 4/24/2023 | 0 |
| 13 | Mattison | No | Non-Res | 4862.20 | Senior | Y | 3.86 | 13 | 2237 | 27360 | 29508 | White | 147 | | 0 |
| 14 | Caden | Yes | Wisconsin | 2783.78 | Junior | Y | 2.97 | 12 | | 8828 | 18464 | White | 90 | 4/7/2023 | 0 |
| 15 | Remington | No | Wisconsin | 239.03 | Sophomore | Y | 2.69 | 16 | | 8086 | 18464 | White | 48 | 4/13/2023 | 0 |
| 16 | Yeager | Yes | Wisconsin | 700.00 | Senior | Y | 3.55 | 18 | 2237 | 3281 | 18464 | White | 109 | | 0 |
| 17 | Tyler | No | Wisconsin | 2226.22 | Freshman | Y | 4 | 16 | | 7423 | 18464 | White | 21 | 4/19/2023 | 0 |
| 18 | Anthony | No | Wisconsin | 1606.41 | Freshman | Y | 2 | 14 | | 0 | 18464 | African Am, White | 10 | 4/26/2023 | 0 |
| 19 | Kaitlyn | No | Wisconsin | 3545.83 | Senior | Y | 3.39 | 16 | | 12976 | 18464 | White | 96 | 4/7/2023 | 0 |
| 20 | Marquis | No | Wisconsin | 2226.13 | Freshman | Y | 2.25 | 11 | | 0 | 19332 | African Am | 20 | 4/19/2023 | 0 |
| 21 | Caden | No | Minnesota | 105.42 | Sophomore | Y | 3.34 | 17 | | 18700 | 19146 | Am Indian, White | 42 | 4/14/2023 | 0 |
| 22 | Benjamin | No | Minnesota | 215.80 | Senior | Y | 3.09 | 16 | 2237 | 3497 | 25677 | White | 119 | | 0 |
| 23 | Brandon | No | Wisconsin | 100.96 | Senior | Y | 2.61 | 12 | | 2304 | 18464 | White | 95 | 4/7/2023 | 0 |
| 24 | Jadyn | No | Wisconsin | 125.00 | Freshman | Y | 3.69 | 15 | | 1700 | 18464 | White | 16 | 4/20/2023 | 0 |
| 25 | Grace | No | Minnesota | 199.00 | Sophomore | Y | 2.71 | 13 | | 18303 | 19146 | White | 59 | 4/12/2023 | 0 |
| 26 | Terrance | No | Wisconsin | 205.00 | Freshman | Y | 2.46 | 15 | | 0 | 18564 | African Am | 21 | 4/19/2023 | 0 |
| 27 | Pierson | No | Wisconsin | 476.99 | Freshman | Y | 3.66 | 13 | | 15432 | 19012 | White | 15 | 4/20/2023 | 0 |

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I add a column to the spreadsheet (right in front of the balance due) allowing me to make notes that are pertinent to each student's eligibility.

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| C | D | E | F | G |
|--------------|-----|-----------|---|---------|
| get_first_na | FMT | Residency | | Balance |
| Ryan | Yes | Non-Res | M2G 1456.00 | 6308.45 |
| Amir | No | Minnesota | | 1585.23 |
| Laural | No | Wisconsin | Not WI public HS | 5070.01 |
| Ella | No | Wisconsin | | 1492.43 |
| Israel | No | Wisconsin | | 206.93 |
| Madelyn | No | Wisconsin | | 1013.01 |
| Jaden | Yes | Non-Res | M2G 5501.04 | 2061.45 |
| Amari | No | Wisconsin | | 2146.61 |
| Halia | No | Wisconsin | | 2160.70 |
| Matthew | Yes | Wisconsin | M2G 6549.14 | 459.43 |
| Ashlyn | No | Minnesota | Declined US Reduced Sub PELL Ath \$205 | 6323.42 |
| Teegan | Yes | Wisconsin | M2G 466.76 | 1016.86 |
| Sydney | No | Wisconsin | CC \$140 (off campus) | 1608.80 |
| Tanner | Yes | Wisconsin | M2G 4538.43 FFWS | 1860.34 |
| Zeina | No | Wisconsin | | 2122.77 |
| Brayden | No | Wisconsin | Textbooks \$754.11 | 7568.43 |
| Ela | No | Wisconsin | | 500.83 |
| Brayden | No | Minnesota | | 2242.24 |
| Ryan | Yes | Wisconsin | M2G 2009.77 | 772.01 |
| Tristan | Yes | Wisconsin | M2G 1291.43 CC \$190, Ath \$2700 | 3419.03 |
| Brandon | No | Wisconsin | | 1259.08 |
| Ava | No | Wisconsin | Declined loans - PELL | 3075.26 |
| Sarah | No | Minnesota | | 3037.42 |
| Megan | No | Wisconsin | CC \$70 | 1056.75 |

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Using other existing queries:

- **Unaccepted aid query**
- **Pending ELC/MPN query**
- **Aid accepted but not disbursed query**
 - **Private loans**
 - **Scholarships**

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Borrowers with previous M2G

Because we limit a student to \$6000 cumulative in M2G, we need to determine how much has already been received.

I mark this in the notes column.

If a student will exceed the \$6000 if we award them all they are eligible, the committee will review it to determine how to proceed.

I also look to see if they are on our “No Longer Eligible” list

Creating a Retention Grant

Reviewing each individual student

The last step is the one that takes the longest

Review each individual student's account to see if they have charges that are not allowed.

I also review their award to see if they have declined or reduced aid (usually loans).

I double check whether the student may have changed grade levels and offer the additional loan if they have. I then send a communication to the student letting them know the loan is on their financial aid offer.

Creating a Retention Grant

Reviewing each individual student

I make comments in the notes column and code them **yellow** if they are eligible for M2G and **blue** if they are not currently eligible but could be if they meet certain criteria (or if they are below \$100 after considering non-allowed charges).

If the bill is now paid, I color code the student in **red** indicating they are not eligible and don't need to be reviewed again.

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Once everyone on the master spreadsheet has been reviewed, I sort them by color, moving the blue lines and red lines to the bottom.

I now add columns for each aid type available and a column for total.

| G | H | I | J | K | L | M | N | O | P | Q |
|---------|------|--------|------|------|------|------|------|-----------|------|-------|
| Balance | FFWS | LAWTON | OBF | TAG | COON | M2G | UWSA | EMER SEOG | NR | TOTAL |
| | | | | | | | | | | |
| 462.56 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 186.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 1085.92 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 7361.18 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 4784.40 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 808.38 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 1606.41 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

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I also put the total available for each item type a couple of lines below the spreadsheet and add a line for the amount still available.

Using a formula, I set it up so that the sum of the column will appear and adjust as I add items.

| | | | | | | | | | | | |
|----------------------------|------------|-----------|------------|-----------|------------|----------|-----------|------------|------------|-----------|------------|
| M2G 1041.59 | 977.41 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 977.41 | 0.00 | 0.00 | 977.41 |
| M2G 3164.73 Textbook \$10 | 2621.32 | 0.00 | 0.00 | 0.00 | 2611.32 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2611.32 |
| | 568,988.75 | 20,495.00 | 0.00 | 61,750.00 | 49,753.31 | 6,565.00 | 73,555.00 | 71,199.94 | 258,726.46 | 0.00 | 542,044.71 |
| | | | | | | | | | | | |
| Amount Available | | 20,495.00 | 107,268.00 | 61,750.00 | 104,791.00 | 6,565.00 | 73,555.00 | 163,303.02 | 300,000.00 | 10,000.00 | 847,727.02 |
| Remaining Available | | 0.00 | 107,268.00 | 0.00 | 55,037.69 | 0.00 | 0.00 | 92,814.98 | 42,055.75 | 10,000.00 | 307,176.42 |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

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I review each of those coded yellow (eligible) and confirm that none of them have paid their bill since they were last reviewed.

An email is sent to all of these letting them know we may be able to help them pay their outstanding balance.

We attach a link to a simple application in DocuSign.

The due date for the application is generally no more than a week after the email is sent.

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A sample of the email sent to the students:

The UWL Financial Aid Office has some one-time financial aid in the form of a grant (FREE MONEY), to assist students who still have outstanding Fall balances. Our records indicate that you may be eligible for this assistance.

Unfortunately, we have a short deadline for applying for this aid. For consideration for this grant, please complete the attached document and return it to me **NO LATER THAN NOON, THURSDAY, November 12**. Completing this application is not a guarantee that you will be receiving these grant funds or that any grant awarded will pay the entire balance due.

Not paying your bill could delay your ability to register at your scheduled time.

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The questions on the application:

- 1- What is preventing you from paying your campus bill in full this semester?**
- 2- Do you have resources coming yet to pay your current bill? If yes, explain the source and amounts.**
- 3- Is part of your outstanding balance due to Campus Cash? If so, what did you use it for?**
- 4- Do you plan to return to UWL next semester?**
- 5- When do you expect to graduate from UWL?**

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HEERF III

When we used HEERF III funds, we added a sentence indicating that the funds could be used to pay their balance and we required a signature.

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Phone calls

We have our student works make phone call to these students

Basically, they tell them “We recently sent you an email with an application for a grant (free money) that could help pay your outstanding balance but the application is due in a few days. Contact us if you have questions.”

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What to do once the student returns the application:

- Review to see why they haven't paid the bill
- See if they indicated any additional funds
- If the additional funds are paychecks, tax returns or plasma donations, we don't count them
- We DO count anything they indicate will be paid by a parent or a private loan.
- If they indicate they are transferring out of UWL, we would not consider them eligible for M2G.

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- We determine how much they are eligible for
- What type of aid we will award them
- We will look at need and residency as well as whether they are a Pell recipient in order to determine what type of aid
- Enter that amount on the master spreadsheet
- After the deadline has passed, add the grant to the student's financial aid offer. It should then disburse the next day.

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Send an email to the student letting them know if they are receiving the grant.

If grant paid the entire outstanding balance:

CONGRATULATIONS! I am pleased to inform you that you have been awarded a grant to assist with paying your outstanding Spring Semester balance. **This grant was sufficient to pay your entire Spring balance.** You can view the amount of your grant by looking at your financial aid offer on WINGS. The funds for this grant should be applied to your bill in the next 1-2 days.

It is possible that finance charges have accrued since the last bill was generated and you will be responsible for those charges.

Good luck with the rest of your semester. Feel free to contact me if you have any questions.

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If grant didn't pay the entire balance:

CONGRATULATIONS! I am pleased to inform you that you have been awarded a grant to assist with paying your outstanding Spring Semester balance. This grant **will not** pay your entire balance and you are responsible for any amount not covered by this grant. I encourage you to pay the remainder of your balance prior to the due date to avoid any additional finance charges and to enable you to register at your scheduled time.

You can view the amount of your grant by looking at your financial aid offer on WINGS. The funds for this grant should be applied to your bill in the next 1-2 days.

It is possible that finance charges have accrued since the last bill was generated and you will be responsible for those charges.

Good luck with the rest of your semester. Feel free to contact me if you have any questions.

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If the student was declined the grant:

Thank you for your application to receive the additional grant to assist with your outstanding balance. After review of your application, I regret to inform you that you were not selected.

If we can be of assistance to you in any way to help you find a way to pay your outstanding balance, please don't hesitate to contact me or someone else in our office.

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Second Round?

If we still have funds to spend, we will process a second round

- Give 1st round non-responders a second chance
- Consider adding the following for consideration
 - Graduate students who meet the criteria
 - Student with higher EFCs
 - Students who are graduating that semester

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How long does this project take?

Generally, the first round can take 2 to 3 weeks if only one person is working on it.

In semesters when we have had a large amount to spend, we have awarded without an application.

This makes the process go much faster.

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Ways to speed up the process?

- Have more than one person doing the initial review that determines who might be eligible.
- Perhaps divide the spreadsheet so that each staff member or each counselor deals with a portion of the list
- Have one person take it from there, evaluating the applications and doing the awarding
- Don't require an application. Treat it as a spenddown of each type of aid.

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What if you don't have a lot to spend?

- Don't pay the entire balance, just pay enough so they can register.
- Set lower cumulative eligibility
- Limit each student to only one retention grant

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What if the student would exceed the \$6000 max?

- The committee will decide if there are sufficient funds to consider them
- If so, we require them to meet with a counselor (Ben) before the grant is disbursed
 - Determine why they aren't paying their bill
 - They won't be eligible again
- Add the students to our "No Longer Eligible" list

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HELPFUL TIPS

- **We don't advertise the grant**
- **We work with our Office of Multicultural Support Services**
- **Try to have at least the 1st round disbursed prior to the first date for scheduled registration**
- **After you are done awarding, add the students to a student group.**

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HELPFUL TIPS

- **Keep a folder with a printout of each semester's recipients to monitor their cumulative grants**
- **Each semester, I create a summary with the process and the outcome for our Director and the Provost**
- **Seek out campus partners who might be willing to provide funds for the grant**

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How much have we been able to award since the Spring of 2012?

Through this semester, we have spent \$3,773,634.38 in the M2G process for all types of aid

1612 students have received M2G since it started

For this semester, we spent \$542,044.71 on 283 students

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| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
|-------------|------------|--------------|------------|------------|------------|-----------|-----------|----------|-----------|----------|-----------|------------|------------|-----------|--------------|
| Term | M2G | TAG | SEOG | FFWS | NR | M2G2 | OUTCOME | LOGO | VENDING | DINING | COON | EM SEOG | HEERF | UWSA | TOTAL |
| Spring 2014 | 53,450.00 | | | | | | | | | | | | | | 53,450.00 |
| Fall 2014 | 130,700.00 | | | | | | | | | | | | | | 130,700.00 |
| Spring 2015 | 96,519.00 | | | | | | | | | | | | | | 96,519.00 |
| Fall 2015 | 1,700.00 | 24,360.00 | | | | | | | | | | | | | 26,060.00 |
| Spring 2016 | 74,661.00 | 34,672.00 | | | | | | | | | | | | | 109,333.00 |
| Fall 2016 | 78,513.00 | 133,891.00 | | | | | | | | | | | | | 212,404.00 |
| Spring 2017 | 13,013.00 | 129,665.00 | | | | | | | | | | | | | 142,678.00 |
| Fall 2017 | 44,965.00 | 79,922.00 | 7,377.00 | 17,348.00 | 6,835.00 | | | | | | | | | | 156,447.00 |
| Spring 2018 | 42,647.00 | 63,544.00 | 39,195.00 | 17,426.00 | 0.00 | | | | | | | | | | 162,812.00 |
| Fall 2018 | 13,965.00 | 66,126.00 | 13,401.00 | 27,469.00 | 5,404.00 | | | | | | | | | | 126,365.00 |
| Spring 2019 | 33,621.00 | 88,146.00 | 7,695.00 | 27,469.00 | 6,084.00 | | | | | | | | | | 163,015.00 |
| Fall 2019 | 17,411.00 | 69,768.00 | 15,055.00 | 12,974.00 | 0.00 | | | | | | | | | | 115,208.00 |
| Spring 2020 | 23,408.00 | 54,292.00 | 21,230.00 | 28,116.00 | 0.00 | 34,287.00 | | | | | | | | | 161,333.00 |
| Fall 2020 | 18,867.00 | 115,667.00 | 11,450.00 | 21,241.11 | 15,966.00 | 0.00 | | | | | | | | | 183,191.11 |
| Spring 2021 | 0.00 | 30,134.81 | 10,956.69 | 21,791.11 | 25,693.88 | 0.00 | 33,750.00 | 8,000.00 | 15,000.00 | 4,000.00 | 5,435.98 | 128,708.30 | | | 283,470.77 |
| Fall 2021 | 67,590.00 | 87,381.58 | 30,678.84 | 21,274.00 | 20,030.05 | 0.00 | 20,000.00 | 0.00 | 0.00 | 0.00 | 7,000.00 | 0.00 | | | 253,954.47 |
| Spring 2022 | 13,204.00 | 102,638.37 | 33,422.56 | 21,274.00 | 41,678.29 | 0.00 | 8,518.40 | 0.00 | 0.00 | 0.00 | 0.00 | 277,881.90 | | | 498,617.52 |
| Fall 2022 | 0.00 | 27,939.15 | 7,578.99 | 18,415.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 229,933.36 | 72,165.30 | 356,031.80 |
| TOTALS | 724,234.00 | 1,108,146.91 | 198,040.08 | 234,797.22 | 121,691.22 | 34,287.00 | 62,268.40 | 8,000.00 | 15,000.00 | 4,000.00 | 12,435.98 | 406,590.20 | 229,933.36 | 72,165.30 | 3,231,589.67 |

Creating a Retention Grant

Has the M2G process had an impact on retention?

Approximately 91% of students who received a Maroon to Gray Grant (including all types awarded in the M2G process) returned the semester following the M2G award.

Campus-wide, our Cohort Persistence Rate Over Time of incoming freshmen who persisted to the Spring Semester has increased from 93.5% to 94.4%

Of M2G recipients, 76% either have graduated from UWL or are currently enrolled at UWL.

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What other benefits are there?

By receiving a grant to pay their bill, students are not borrowing as much in loans

Students are more likely to get the classes they need, thereby not delaying graduation

Students living paycheck to paycheck receive relief, enabling them to afford other necessities

Creating a Retention Grant

SQL for our initial query

```
SELECT A.EMPLID, G.DISBURSED_AMOUNT, get_last_name(A.EMPLID), get_first_name(
A.EMPLID), CASE WHEN get_student_groups( A.EMPLID) LIKE '%FMTG%' THEN 'Yes' ELSE 'No'
END, get_residency( A.EMPLID), B.ACCOUNT_BALANCE, get_year_in_school_by_term(
A.EMPLID,':2'), C.SAT_ACADEMIC_PRG, get_uwl_gpa( B.EMPLID, ':2','UGRD'),
TO_NUMBER(get_current_credit_load(A.EMPLID)), get_exp_grad_term( A.EMPLID),
TO_NUMBER(fa_get_efc(A.EMPLID, ':1')), TO_NUMBER(get_cost_attend( A.EMPLID, ':1')),
get_email( A.EMPLID), get_cell_phone( A.EMPLID), get_ethnic_codes( A.EMPLID), get_cum_credits(
A.EMPLID), TO_CHAR(F.APPT_START_DATE,'YYYY-MM-DD'), get_all_credit_load( A.EMPLID,':3'),
get_text_phone(A.EMPLID)
FROM((((PS_ISIR_STUDENT A LEFT OUTER JOIN PS_ACCOUNT_TOT VW B ON A.EMPLID
= B.EMPLID ) LEFT OUTER JOIN PS_STDNT_AID_ATTRB C ON A.EMPLID = C.EMPLID AND
A.INSTITUTION = C.INSTITUTION AND A.AID_YEAR = C.AID_YEAR AND A.TABLE_ID =
C.TABLE_ID ) LEFT OUTER JOIN PS_SCC_ENR_APPT_VWF F ON C.EMPLID = F.EMPLID AND
C.INSTITUTION = F.INSTITUTION AND F.STRM = :3 ) LEFT OUTER
JOIN PS_PERSON_CHECKLST E ON A.EMPLID = E.COMMON_ID ) LEFT OUTER
JOIN PS_STDNT_AWARDS G ON A.EMPLID = G.EMPLID AND A.INSTITUTION = G.INSTITUTION
AND A.AID_YEAR = G.AID_YEAR AND G.ITEM_TYPE = '999999992241' ), PS_ISIR_CONTROL D
```

Creating a Retention Grant

```
WHERE ( D.EMPLID = A.EMPLID
AND D.INSTITUTION = A.INSTITUTION
AND D.AID_YEAR = A.AID_YEAR
AND D.EFFDT = A.EFFDT
AND D.EFFSEQ = A.EFFSEQ
AND ( A.EFFDT =
  (SELECT MAX(A_ED.EFFDT) FROM PS_ISIR_STUDENT A_ED
  WHERE A.EMPLID = A_ED.EMPLID
  AND A.INSTITUTION = A_ED.INSTITUTION
  AND A.AID_YEAR = A_ED.AID_YEAR
  AND A_ED.EFFDT <= SYSDATE)
AND A.EFFSEQ =
  (SELECT MAX(A_ES.EFFSEQ) FROM PS_ISIR_STUDENT A_ES
  WHERE A.EMPLID = A_ES.EMPLID
  AND A.INSTITUTION = A_ES.INSTITUTION
  AND A.AID_YEAR = A_ES.AID_YEAR
  AND A.EFFDT = A_ES.EFFDT)
AND A.AID_YEAR = :1
AND B.ACCOUNT_BALANCE > 100
AND E.CHECKLIST_CD = 'FAPP' || SUBSTR(:1,3,2)
AND E.CHECKLIST_STATUS <> 'I'
```

Creating a Retention Grant

```
AND C.SAT_ACADEMIC_PRG <> 'N'  
  AND TO_NUMBER(get_current_credit_load( A.EMPLID)) > '5'  
  AND TO_NUMBER(get_cost_attend( A.EMPLID, :1)) > TO_NUMBER(fa_get_efc( A.EMPLID, :1))  
  AND get_year_in_school_by_term( A.EMPLID,:2) IN ('Freshman','Sophomore','Junior','Senior',' ') )  
ORDER BY 3
```



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