

# Creating a Funder-Initiated Opportunity

Funder-initiated opportunities will not appear in student searches in SAFE, since students will not apply in SAFE. If you want students to be able to apply for the funding in SAFE, enter a student-initiated opportunity.

With funder-initiated opportunities, you can award funding as soon as award decisions have been finalized.

## Logging Into SAFE

To log into SAFE:

1. Enter the URL [www.princeton.edu/studentfunding](http://www.princeton.edu/studentfunding) in your web browser.
2. On the CAS login page, enter your **NetID** and **Password**.
3. Click the **Login** button, or press the **Enter** key. The SAFE Home page is displayed.

**Note:** If you need access to SAFE, send an email to [safe@princeton.edu](mailto:safe@princeton.edu).

## Creating the Opportunity

If you are the *Funding Office Manager*, you must create the funding opportunity and assign it to the administrator.

1. On the Opportunities tab, click the **Create New Funding Opportunity** link.
2. In the *Add Opportunity Admin* field, start typing the name of the administrator. When a list appears, select the name you want, and click **Add Administrator**.  
**Tip!** When the name has been added, it appears above the field, with a red-framed X in front of it.
3. Enter the *Title* of the opportunity and click the **Save** button.
4. If you are also the Funding Opportunity Administrator, continue with step 3 under "Entering the Opportunity".

## Entering the Opportunity

Once you have been assigned as the Funding Opportunity Administrator for an opportunity, you can complete the entry of the funding opportunity and award funds.

### To enter the funding opportunity:

1. From the SAFE Home page, click the **Manage My Opportunities** link, or from any page, click the Opportunities tab.
2. Search for your funding opportunities:
  - a) Leave the default *Funding Office*, and either select an *Activity Type*, or use the default, **ALL**.
  - b) Click **Search**.
  - c) In the Search Results, locate the opportunity you need to complete, and click on the Name link to open the opportunity.

Locate the opportunity you have been assigned, and click the name link to open it

Name	Description	Action
test for funding opportunity admini...	This is a great opportunity that has already been awarded to a student. You're the lucky student!	award funding
Funder-Initiated Summer Abroad Opportunities		award funding

Notice that the opportunity will most likely not have a description at this point.

3. If you want to assign a backup Funding Opportunity Administrator, start typing the name in the *Add Opportunity Admin* field. Select the name from the list that appears, then click the **Add Administrator** button.  
**Tip!** When the name has been added, it appears above the field, with a red-framed X in front of it.
4. The Title and Funding Office will already be entered. Describe the funding opportunity by completing the remaining fields under Fund Information, selecting **Funder-Initiated** as the *Fund Request Initiation Type*.

**Note:** While the *Short Description* field is used to identify the opportunity for yourself and other administrators, the *Fund Opportunity Description* will show up in student communications, and in reports.

**Tip!** The *Contact Name and Email* should identify the same person, unless you use a generic email account not associated with a single person.

5. Under Basic Eligibility Requirements, select the Activity Type to be funded. If funding is available for more than one type of activity, you (or the Funding Office Manager) will need to create separate funding opportunities for each activity type.

**Note:** You should make the remaining eligibility requirements match the student(s) who have been awarded the funds.

**Tip!** If the student is not allowed to seek additional funding, select **Fully Funded** in the *Funding Amount Restrictions* field, otherwise, select the appropriate value. If you select **Fixed** or **Range**, you will need to enter the amount(s).

6. If necessary, click the **add more cycles** link to open the Application Cycles fields. Then define the funding cycle by entering *Start* and *End* dates for the Application Period (when the student may apply), the Publishing Period (when the student will see the opportunity), and the Funding Period (when the funds will be awarded).

**Note:** You must enter dates for the *Application Period* and *Publishing Period*, even though the opportunity will not be published and students will not apply through SAFE. Since you must enter dates, it is suggested that you use the start and end of the Academic Year.

Of course, you will enter the actual *Funding Period* dates for the awarded funds.

**Tip!** If you know the future funding cycle dates for this opportunity, click the **add more cycles** link and enter the dates for the future cycles. Other than the new dates, cycle name and class years, you will not need to reenter the rest of the opportunity information.

7. Enter a *Cycle Name*, which will appear on the award funding page.
8. Select the *Class Year* of the student(s) to whom you will be awarding funds.
9. Click the **Save Changes** button to save the funding opportunity.



# Awarding a Funder-Initiated Opportunity

When you are ready to award the funder-initiated opportunity to one or more students, you can search for the opportunity, and then select the **award funding** action for that funding opportunity.

**Note:** When entering the award information, make sure that the award data matches what was defined in the funding opportunity eligibility requirements.

## To award funding to a student:

1. On the Opportunities tab, leave the default *Funding Office*, and select the desired *Activity Type*, or **ALL**.
2. Click the **Search** button to find your funding opportunities.

Enter your search criteria (or leave the defaults) and click **Search** to find your funding opportunities

Locate the opportunity and click **award funding**

To view the opportunity, click the name link

3. Locate the opportunity you want to award in the search results, and click the **award funding** Action.
4. Start typing the student's name in the *Student* field. When the list of students appears, you can select the student to whom the funding is awarded by clicking on the student's name. If the name does not appear in the list, keep typing until it does, or scroll the list until you find the name.

When you select the student's name, an orange box appears next to the *Student* field, with information about the student, including their class year, their department (if they have selected a concentration), and their open projects.

5. Type the *Project Title*. This will appear in the email to the student, in the student's project list, and when other funding offices consider funding this student.
6. Select the location of the activity, being sure to select the same location as was specified in the funding opportunity eligibility requirements.
7. Enter the Start Date and End Date of the student's activity, making sure that these dates are within the range specified in funding opportunity eligibility requirements.
8. In the Amount field, specify the dollar amount awarded.
9. Indicate whether *This award is Preliminary* or **Final**.  
*Tip! Students are not notified of preliminary awards.*

If additional funding is allowed, select **Additional Funding Is Allowed**.

11. Enter the date by which the student must accept the award in the *Deadline to Accept* field.
12. Enter any information you want to send to the student in the *Additional Comments and Information* field.
13. Click the **Post This Award** button. The project will be added to the list at the bottom of the page. Notice that you can take up to 4 actions for each posted project:
  - **View** opens the project associated with this award
  - **Edit** opens the fields on the posted project for editing. You can **save** or **cancel** changes.
  - **Withdraw** opens a window where you can enter a subject line and text for an email to be sent to the student. Once you withdraw the posted project, it is moved to the Withdrawn Projects section, and a **Delete** action appears, so you can delete the posted project.
  - **Remind** sends an email to the student, reminding them of the deadline for accepting the award.

The student is notified of the award in an email. If the student is applying for funding to other funding offices, those offices can see this award, and can see whether the student is allowed to seek additional funds or is prohibited from doing so.

- ✧ If additional funds are allowed,
  - a) The email will indicate that a record has been initiated and the student should log into SAFE to complete the application.
  - b) When the student opens SAFE, the project will appear in their My Projects list, with the award data provided by the funder.
  - c) The actions the student may take are listed to the right of each project, and include
    - editing the application
    - viewing and accepting the award
    - uploading documents
    - uploading receipts
    - withdrawing (this action appears after accepting the award)
  - d) Once a student selects **edit application**, he or she can click a link in the application to find additional potential funders.
  - e) The student completes the application. The process proceeds as normal from this point.
- ✧ If additional funds are not allowed,
  - a) The email indicates that an award has been made, and they should log into SAFE to see the award.
  - b) The student will find the award in their My Projects list. The actions the student may take are listed to the right of each project, and include
    - viewing (but not changing) the application
    - viewing and accepting the award
    - uploading documents
    - uploading receipts
    - withdrawing

In either case, the student must accept the award before the deadline you specified.

