

# Creating a Student-Initiated Opportunity

Student-initiated opportunities are entered by the funding office, and appear in student searches, allowing students to apply for funding through these opportunities in SAFE.

For student-initiated opportunities, funding is awarded on a project basis, after the application deadline has passed.

## Logging into SAFE

To log into SAFE:

1. Navigate to [www.princeton.edu/studentfunding](http://www.princeton.edu/studentfunding).
2. Enter your **NetID** and **Password**.
3. Click the **Login** button, or press the **Enter** key. The SAFE Home page is displayed.

## 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 for the funding opportunity.

### 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**. *Tip! If the Activity Type was not assigned when the opportunity was created, you will only find it if you select 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 administrator	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 **Student-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 projects, emails, and 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.*

*Tip! When you have completed your funding opportunity and saved it, you can return to this page to see the student application questions for this activity type. This may help you to decide if you need to adjust any of your basic eligibility requirements.*

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:** If you want the opportunity to be found by many students, make the eligibility requirements fairly broad. Unless you truly want to restrict the opportunity to a specific pool of students, select **ALL** where possible. Only those students who select the same criteria will be able to see this opportunity in a search.

*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. Under Application Cycles, 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 can find the opportunity), and the **Funding Period** (when the funds will be awarded).  
*Tip! It is a good idea to enter a start date for the publishing period well in advance of the application period. You may also want the end date for the publishing period to be later than the application period end date, so students will be able to see that the opportunity was there, if they missed the deadline.*
7. Enter a *Cycle Name*, which will appear on the award funding page.
8. Select the *Class Year* of the students eligible for this funding opportunity. Keep in mind that if your opportunity is for a summer period, graduating seniors should not be selected here.
9. If you already know 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 for each cycle, you will not need to reenter the rest of the opportunity information.
10. Click the **Save Changes** button.



# Managing a Student-Initiated Opportunity

When the publishing start date is reached, students who are active or on leave and who enter the right criteria will be able to find your funding opportunity in SAFE. They can then create projects that describe their activity and the specifics of their funding needs, and apply for funding opportunities.

## Searching for Projects

You can see the projects of any student who has applied for your funding opportunities. Any additional funding they have requested will also be visible for you to see.

1. On the Projects tab, leave the default *Funding Office*, and select the desired *Activity Type* (or leave the Activity Type blank to find projects in any activity type).
2. You can also restrict your search to projects past the end date, projects in a specific award status (including **Not Reviewed**), open projects, a quick search for non-final projects, or projects for a specific applicant.
3. Click the **Search** button to find projects submitted for your funding opportunities.

Enter your search criteria (or leave the defaults) and click **Find Projects**

To create an Excel file, click either **Export Project** or **Export Project Financials**

To view the project, click the **view project** link

To award funding, click the **award funding** link

4. When the search results are displayed, you can export the projects or the project financials as an Excel comma-separated values file, you can view a specific project, or you can award funding for a specific project.

## Viewing Projects

On the View Project page, you can

- ✧ Scroll through the student's application to review it online.
- ✧ Click the **Print** link at the top of the View Project page to print a copy of the application.
- ✧ Display any documents the student has attached by clicking the document name in the Documents section.
- ✧ Review the Adviser, Department Representative, and Recommender evaluations.

## Awarding Project Funding

When the application end date has passed, and you have reviewed the projects and determined funding, you can award funding.

### To award funding to a student:

1. Locate the project as described in "Searching for Projects", and click the **award funding** Action.
2. When you have reviewed the attached documents, click the **Verify** action for each document you have verified.
3. Review the project budget and any funding already awarded from other offices.
4. Enter the funding you are awarding for each expense line, or award a lump sum, and click the **Save Preliminary** button below the amount fields.
5. Under Funder Discussion, enter any comments you want to appear for other funding opportunities to which the student has applied, and click the **Save Funder Comments** button.
6. If you want to enter comments for the applicant, type them in the *Applicant Comments* field and click the **Save Applicant Comments** button.
7. To leave the award in a **Preliminary** status, you can return to the My Projects tab **without** clicking the **Offer Awards On This Project** button.

To award the funding with a **Final** status, click the **Offer Awards On This Project** button. The page will be redisplayed with the award status of Final (green) in the Project Budget section.

**Note:** If necessary, you can reopen a finalized award to make changes by clicking the **Reopen Offered Award** button at the bottom of the page.

The student is notified of the award in an email. If the student is applying for funding to other funding offices, these offices can also see this award.

**Note:** If the award is fully funded, the email that goes out to students who have been awarded funding should include a notice that this is a fully-funded award, and they need to withdraw any other pending applications and decline any other awards that have already been offered.

## Tips!

- ✧ An opportunity is not a fund, award, or account. Multiple funds or accounts might award money for a single opportunity.
- ✧ Be very careful when setting eligibility requirements; it's the difference between having applicants and not having applicants, and having appropriately eligible applicants or not.
- ✧ When creating a funding opportunity, you can view the template sections of the student application after you have selected the activity type and saved the opportunity.

