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For Funding Office Managers

What is a Funding Office Manager?
The Funding Office Manager (FOM) creates the funding opportunity by giving it a title, and then assigns it to a Funding Opportunity Administrator (FOA). The FOM can also complete other fields, but the assigned FOA will be able to change those values if necessary. In some cases, the FOM and the FOA will be the same person. In this case, the same individual can initiate and complete the creation of a funding opportunity. Funding Office Managers may view all Funding Opportunities within their office.

Creating a Funding Opportunity

The information about a funding opportunity is entered in 4 sections:

1. Fund Information
2. Basic Eligibility Criteria
3. Application Cycles
4. Administrators for this Opportunity

You will only need to enter the Title in the Fund Information section, and the Funding Opportunity Administrator in the Administrators for this Opportunity section.

To create a funding opportunity,

1. Click on the Opportunities tab, or the View Opportunities link under “What do you want to do?” on the Home page.
2. Click the link for Create a New Opportunity or, to edit or finish creating an opportunity, click on the name of the desired funding opportunity.
3. In the Administrators for this Opportunity section, begin typing the name of the Funding Opportunity Administrator to whom you want to assign this opportunity. A list of names that match what you have typed is displayed. You can keep typing until the name you want appears, or scroll through the displayed list to find the name you want.
4. When you select the name, it will appear below the field, with information that helps to identify the person. If this is the correct person, click the Add Administrator button. The person’s name and identifying information will appear above the field with a white X framed in red in front of it.
   Tip! The red-framed X is your best indicator that the person has been added as the FOA.
   Note: If you need to remove an administrator you have assigned, click the red-framed X in front of the name you want to remove.
5. Type the title of the funding opportunity in the Title field. This title will appear in student searches, so you will want to make it fairly descriptive.
6. Scroll down, if necessary, and make sure that your funding office appears in the Funding Office field.
7. If you are also the Funding Opportunity Administrator, continue with the procedure under Creating a Group-Initiated Opportunity, Fund Information Fields below.
8. Click the Save button to save the funding opportunity and assign it to the specified FOA.
For Funding Opportunity Administrators

What Do Funding Opportunity Administrators (FOAs) Do?

Funding Opportunity Administrators have the ability to:

- Complete the entry of opportunity details, such as contact information, description, eligibility criteria, and application cycles for all opportunities assigned to them.
- View all project applications for their opportunities and make awards.
- View all opportunities to which a student has ever applied in SAFE, previous awards made, and concurrent applications to other funding opportunities for the same project.
- Export and print information.
- Communicate with other FOAs when a student is applying to multiple funding opportunities for the same project.

Searching for Funding Opportunities

When you have been assigned to a funding opportunity, you will need to complete the information in SAFE for that opportunity. You may also want to find opportunities in SAFE to check for applications, and to enter awards. To search for a funding opportunity:

1. From the SAFE Home page, click the Manage My Opportunities link under “What do you want to do?”, or from any page, click the Opportunities tab.
2. On the Search Funding Opportunities page, select your Funding Office and the Activity Type for the funding opportunity for which you are searching, or ALL.
3. Click the Search button.
4. The funding opportunities that match your search criteria will be listed under the Search Results. Click the Name of the opportunity to open the record for that opportunity.

Creating a Group-Initiated Opportunity

When you are assigned as an administrator for a funding opportunity, it has technically already been created although you will need to complete the information in SAFE for that opportunity. The required information fields are in red.

Add Opportunity Administrators, Student Chairs, and Student Reviewers

You are the funding opportunity administrator (FOA) for this opportunity. You may add additional FOAs, Student Chairs, and Student Reviewers for this opportunity. The selection process for some group funding opportunities is managed by students. If this is the case for your funding opportunity, you will need to add one or more Student Chairs and Student Reviewers. The process for setting up Student Chairs and Reviewers is the same as described for FOAs. Student Chairs will be able to read and act on any applications received for their funding opportunity only within SAFE. Student Reviewers will have read-only access only for applications for their specific funding opportunity.

At the top of the opportunity for group opportunities, there are 3 sections:
1. Add Administrator (FOA)
2. Add Student Chair (may add more than one)
3. Add Student Reviewer (may add more than one).

<table>
<thead>
<tr>
<th>Field</th>
<th>What to do</th>
<th>Usage Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Opportunity Administrators, Student Chairs and Student Reviewers</td>
<td>Start typing the name of the Funding Opportunity Administrator to whom you want to assign this opportunity. Select the desired name from the list that will appear. Then click the Add Administrator button to add the name. To remove an administrator, click the red-framed X in front of the name you want to remove.</td>
<td>A list of names that match what you have typed is displayed. You can keep typing until the name you want appears, or scroll through the displayed list to find the name you want. When you select the name, it will appear below the field, with information that helps to identify the person. When the name has been added, it appears above the field, with a red-framed X in front of it. This is your best indicator that the name has been added.</td>
</tr>
</tbody>
</table>

### Fund Information Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>What to do</th>
<th>Usage Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>You should not need to make any changes to this field.</td>
<td>Entered by the FOM.</td>
</tr>
<tr>
<td>Short Description</td>
<td>Enter up to 10 characters that can identify this funding opportunity</td>
<td>Used in internal reports to identify the opportunity. Student applicants will not see the short description.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Enter the name of the person who should be contacted by a student wishing more information.</td>
<td>This must be an active Princeton employee. This name and email will appear at the bottom of all email notifications that go out to the student. You may use your own contact information, or you may want to use a distribution list email for the email contact.</td>
</tr>
<tr>
<td>Contact email</td>
<td>Enter the email address of the person specified as the contact.</td>
<td>Be sure to include the full address, for example, <a href="mailto:lean@princeton.edu">lean@princeton.edu</a>, not just lean. In most cases, the contact e-mail will match the contact name, unless your office uses a generic email account to handle queries.</td>
</tr>
<tr>
<td>Field</td>
<td>What to do</td>
<td>Usage Tip</td>
</tr>
<tr>
<td>-------------------------------</td>
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</tr>
<tr>
<td>Website URL</td>
<td>If the funding opportunity has a website with more information, enter the URL of that website here.</td>
<td>Having a website to which you can send students for additional information is very helpful. <em>Tip! Make sure the website contains up-to-date information on the application procedures for the funding opportunity. Do NOT link students to an entirely different application procedure.</em></td>
</tr>
<tr>
<td>Fund Opportunity Description</td>
<td>Provide a description of the funding opportunity. Keep in mind that this can be brief, as students will not see your funding opportunity description unless they already meet qualifying criteria.</td>
<td>Lengthy descriptions should be posted to a website URL and linked to the application for reference. The content of this field will appear in the student email.</td>
</tr>
<tr>
<td>Expense Guidelines URL</td>
<td>Enter the URL of the web page that has the expense guidelines for the students applying for this opportunity (if relevant).</td>
<td>You can open the guidelines web page in a new window, and copy and paste the URL into the SAFE form. This is an optional field.</td>
</tr>
<tr>
<td>Fund Request Initiation Type</td>
<td>Select Group-Initiated if you want students to be able to find this opportunity in a search. Click the box in front of “student will see actual award amount” if you would like the student group to see the name of the funding source for any awards.</td>
<td>Note: This field cannot be changed once you have saved the funding opportunity.</td>
</tr>
<tr>
<td>Application Questions</td>
<td>To see the questions the student must answer, click the Sample Project link. The form will be displayed in a new window. Note: the questions and text of accompanying forms will not be visible until after you have selected and saved the activity type for this funding opportunity.</td>
<td>You cannot change the questions here. If you need to add other application questions, you may put them on a website and link to it, or provide instructions at the end of the next section. Please be careful not to duplicate SAFE questions in any of your supplemental questions.</td>
</tr>
</tbody>
</table>

### Basic Eligibility Criteria Fields

The values you enter here will determine if and when your opportunity will appear in student searches. The more specific your criteria, the fewer students will see your opportunity in their searches.

<table>
<thead>
<tr>
<th>Field</th>
<th>What to do</th>
<th>Usage Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Type</td>
<td>Select the type of activity to which this funding opportunity can be</td>
<td>If you have funding available for more than one type of activity, you will need</td>
</tr>
<tr>
<td>Field</td>
<td>What to do</td>
<td>Usage Tip</td>
</tr>
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</tr>
<tr>
<td></td>
<td>applied. For groups, there are only two activity type options:</td>
<td>to create a separate funding opportunity for each activity type.</td>
</tr>
<tr>
<td></td>
<td>Group Events on Campus or Group Activities Off Campus</td>
<td>Note: This field cannot be changed once you have saved the funding opportunity.</td>
</tr>
<tr>
<td>Funding Amount Restrictions</td>
<td>Select the applicable funding amount restrictions:</td>
<td>If the opportunity is fully funded, the student will not be able to add funding from any other funding opportunities to his/her project. For any other value, the student may add funding to supplement this award from other funding opportunities.</td>
</tr>
<tr>
<td></td>
<td><strong>No restrictions</strong> – the group will be able to apply for additional funding</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Fully Funded</strong> – the group will not be able to apply for additional funding.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Fixed</strong> – the group will receive only the Fixed Amount you specify for this opportunity</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Range</strong> – the group may receive funds within the range you specify for this opportunity</td>
<td></td>
</tr>
<tr>
<td>Activity Location</td>
<td>Specify any restrictions on the location where the student will perform the activity. You may select multiple locations.</td>
<td>If you don’t select all locations, only students who specify the location(s) you selected in their search criteria will see this funding opportunity. Locations may include regions or countries in which a particular language is spoken. Some of these have already been created as options. If you do not see a category you need, please contact the Super Users.</td>
</tr>
<tr>
<td>Other Fund Restrictions</td>
<td>Enter any restrictions that you want students to know about.</td>
<td>This does not restrict what appears in student searches.</td>
</tr>
<tr>
<td>(will appear to applicants)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructions to group for post-project activities</td>
<td>Enter any steps students must complete upon finishing their project. For example, funders may require funding recipients to upload receipts to account for their expenses (so that any unspent funds can be returned to the funding office). Other requirements may include a post-project report, a “thank you” note to the funder (if donor gift funds are used) or documentation the completed</td>
<td>Please provide specific instructions if students must provide materials to the funder outside of SAFE.</td>
</tr>
<tr>
<td>Field</td>
<td>What to do</td>
<td>Usage Tip</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>project. Receipts and pdf documents may be loaded by the student directly into SAFE.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional Application Instructions</td>
<td>Enter instructions for the students who want to apply, if there are application steps outside of the SAFE funding portal.</td>
<td>These instructions appear to the applicant when the project proposal is submitted.</td>
</tr>
<tr>
<td>Website Link to Instructions</td>
<td>If you have a website with instructions for applicants outside of the SAFE portal, enter the URL here.</td>
<td>You can test the link to be sure it was entered correctly. The web page will open in a new window.</td>
</tr>
</tbody>
</table>

**Funding Source**

You may list a name or names of potential funding sources for this opportunity. This is for internal reference only, as funds will be transferred outside of SAFE. *Note: Once PRIME goes live, SAFE will have the ability to transfer funds directly.*

**Application Cycles**

With SAFE, every opportunity can have unique deadline dates (as permitted by the overall Activity Types. In the case of Senior Thesis Research Funding, specific deadlines have already been defined by the Office of the Dean of the College. See [http://www.princeton.edu/odoc/student_funding/](http://www.princeton.edu/odoc/student_funding/) for deadline details).

If the Application Cycle fields are not displayed, click the add more cycles link at the bottom of the section.

<table>
<thead>
<tr>
<th>Field</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Application Period</td>
<td>Enter the start and end date when the students may apply for this funding opportunity.</td>
<td>Make sure the application period does not end before the Publishing Period. Note: Funders can extend the application period to a later date but cannot shorten the application period once it has begun.</td>
</tr>
</tbody>
</table>

*About "locking": There is an important difference between the two activity types for group activities. After a student submits an application in SAFE, she can continue to make changes to her application until it locks. For group events on campus, students’ applications "lock" at the time that the first funder makes an award. For group activities off campus, students’ applications “lock” upon the funder’s application deadline. (If there are multiple funders, the first deadline will lock the application for all the rest.) When an application is locked, funders can be sure that it is final and there are not going to be any major changes.

With the exception of the first funder for a group event on campus, funders should not award projects until they are locked. For these reasons, when funders of group activities off campus set application cycle dates, they should set somewhat narrow application periods to be sure the projects will be locked prior to the time they want to make awards. Funders of group events on campus may want to set their application, publishing and funding periods to reflect a funding “cycle” such as spring or fall semester of a given year.*
<table>
<thead>
<tr>
<th>Field</th>
<th>What to do</th>
<th>Usage Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publishing Period</td>
<td>For group activities off campus, enter the start and end date when you want this opportunity to appear in student searches</td>
<td>It’s a good idea to enter a start date for publishing well in advance of the application period. In most cases, you will want to set your start publishing date as the day when you are satisfied that your funding opportunity information is complete and accurate. You may wish to make the end date of the publishing period coincide with the end date of the application period; alternatively, you may set your publishing end date after your application deadline so that when students search, they see your funding opportunity with a note that the application period is past.</td>
</tr>
<tr>
<td>Funding Period</td>
<td>Enter the date range during which your department expects to be completing the review of applications and awarding funding.</td>
<td>These dates help students and other funders know when they should expect to see an award from your office.</td>
</tr>
<tr>
<td>Cycle Name</td>
<td>Enter a name for the cycle that will identify it internally.</td>
<td>When an opportunity is offered in multiple cycles, the Cycle Name helps to identify which opportunity this is, and when it will be awarded.</td>
</tr>
<tr>
<td>Applicant Message</td>
<td>In most cases, you will leave this field blank.</td>
<td>The field will primarily only be used in special cases, such as when a funding opportunity’s deadline is extended beyond the original date published.</td>
</tr>
<tr>
<td>Field</td>
<td>What to do</td>
<td>Usage Tip</td>
</tr>
<tr>
<td>------------------------</td>
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<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Add More Cycles        | If the funding opportunity will be offered for more than one award cycle, you can add more cycles by clicking the + add more cycles link. By adding more award cycles, you will not need to update your basic funding opportunity information for each cycle. To add additional cycles:  
1. Select the "opportunities tab".  
2. Click on the name of the opportunity in your list to open the create/edit opportunity screen.  
3. Scroll down to the bottom of the screen to the Application Cycles section.  
4. Click "Add More Cycles".  
5. Enter the new dates for application period, publication period and funding period.  
6. Enter a unique name for the new cycle (eg. STR spr14)                                                                                          | *Note: If your department offers funding seasonally (i.e. fall, winter, spring, summer), please create a NEW funding opportunity for each season. This will help you to filter and sort applications with ease, allow students to apply for funding in your future cycles, and keep your data neatly organized in SAFE. Once you have created one funding opportunity for each cycle, you can add cycles for future years.* |
| Delete a funding cycle | You may delete a funding cycle any time prior to the time a student submits an application for that cycle. To delete a funding cycle after it has been added, simply click “delete” to the right of the cycle name and class years.                                                                                     |                                                                                                                                                                                                          |

**Allowing a Student to Apply Post-Deadline (for Group Activities Off-Campus)**

In some cases, a student may miss the deadline for applying to a funding opportunity and may contact the funding office to request an extension. If the funding office agrees to extend the deadline for this student, the FOA may adjust the application deadline for that funding cycle and may place a note in the Applicant Message field to say, for example, that only students who have requested an extension prior to a given date may apply.

*Note: Funders can extend the application period to a later date but cannot shorten the application period once it has begun.*

**Deleting an Opportunity**

Most fields in a funding opportunity description are editable and can be changed up until the time students begin to apply for the opportunity or are awarded funder initiated funds. Two fields lock at the time an opportunity is first created, however, and these cannot be changed: the funding request initiation type (student vs. funder initiated) and the activity type. If you need to change these fields, you will need to delete the entire opportunity and begin a new opportunity with the correct fields. To delete an opportunity, simply click on “my opportunities” and then click “delete” under “action” to the right of the opportunity’s name and description. Warning! Once an opportunity is deleted it cannot be recovered.
**Viewing, Printing and Awarding Group -Initiated Project Applications**

**Viewing Project Applications**

When students have applied for one of your student-initiated funding opportunities, you will be able to view the projects they have entered before awarding funding. To view a project application:

1. On the SAFE Home page, click the **View Projects tab** or the **Award Funding to Projects** link under “What do you want to do?”

2. On the **Search Projects page**, select an **Activity Type**, or leave the field blank to search for all activity types.

3. Verify that the Funding Office displayed is the office you want.

4. Click **Find Projects** to see all projects in your funding office. However, if you want to refine your search, you can enter values in any of the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>What to do</th>
<th>Usage Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show project __ days past end date</td>
<td>Enter a positive value in the field to see only projects that have been completed. Otherwise, leave the default value.</td>
<td>If you want to see both Not Reviewed projects and projects with Preliminary awards, use the Quick Search field.</td>
</tr>
</tbody>
</table>
| Award                         | To see only those projects for which no funding has been awarded yet, select Not Reviewed.  
To see only those projects with funding awarded on a preliminary basis, select Preliminary.  
To see only those projects with funding awarded on a final basis, select Final. | Use this instead of Award when you want to see both Not Reviewed projects and projects with Preliminary awards. |
| Quick Search                  | Use this field to find all projects with an award status other than Final. | If you view open projects, remember that these are not yet locked. Groups may still make changes. Only locked projects should be considered for funding. |
| Project Status                | You can search for projects that are open, locked or withdrawn.            |                                                                           |
Once you click the “Find Projects” button, you will see a list of all applications for your funding opportunity that meet the criteria you included in your search parameters. You can sort these applications by student group name, date submitted, or project date. You may also print all selected applications or export application data to a spreadsheet for simpler viewing. To view an application without making an award, click on “view project.”

Printing Project Applications

Funding opportunity administrators and student chairs can print single projects (applications) or select multiple projects (applications) for printing.

To print a project application:

1. Go to your Projects tab, enter the criteria for the projects you want to display in the search fields.

2. Select/check the box next to the application(s) you want to print or Select All.

   Note: In preparing for print, the system merges all the elements of each application into one large document. The process could use a lot of memory depending on the number and size of the applications you have selected. It is recommended that you limit batch printing to a maximum of 10 applications in one batch to reduce the possibility of your computer or print server timing out and failing to produce the job.

3. Select the button for Print Selected in the upper right corner of the Projects List. The following message in a green banner should appear at the top of the page:

Search Projects

✓ Your projects have been sent for printing. You will receive an email when they are complete.

You will find the email in your SAFE messages list on your Home tab. If you have your SAFE messages set to also deliver to your PU email account, you will also receive the email there.
4. Open your message. It will appear as below:

   The print job you requested is now complete. Please click the link below to view and print the document.

   https://puwebp.princeton.edu/safe/priv/viewprintdoc?requestId=xxxx
   This document will be available for the next 30 days.

5. Click on the link or copy and paste the link into your browser. The link opens a webpage containing the student application(s). All attachments (uploaded transcripts, supporting documents, recommendations, etc) will be imbedded into the "document".

   **Note:** This link will not open for anyone else but the requestor. **Forwarding the link is not an effective method of sharing applications with others. To share applications with others who do not have reviewer access in SAFE, please save the document as a pdf and then attach the pdf to an email correspondence.**

**Converting Applications to PDF Documents**

1. Follow steps 1-5 for Printing Projects.
2. Once the webpage is open displaying the desired document, select convert web page to pdf or Save as pdf depending on the browser you are using.
3. Name the pdf document and save it to a desired location on your computer. Distribute the pdf document which is saved on your hard drive via email attachment.

**Awarding Funds to Group-Initiated Projects**

To award funding to a student group that has applied for a student-initiated opportunity:

1. **Search for the project** as described in “**Viewing Project Applications**”.
2. **Locate the project** for which you want to award funding and select the **Award Funding** Action.
   a. **Note:** It is important to review the student group’s project history by clicking on their name in the projects list. Verify that none of the other student group’s "current projects" are the same as the one for which you are going to award funding. If there is already an existing project, you will need to correspond with the student group leader about duplicate projects. The student group may only have one application for the same activity. They must either apply to your funding opportunity with another project or apply to the other funders with the project you are viewing. Duplicate projects can cause confusion among funders and is not permitted.
3. **Review the application** and any attachments. When you have verified the attached documents, click the **Verify** Action. Verifying a document locks it to the application so that it cannot be withdrawn by the student. For this reason, you should wait to verify a document until the application has locked.
4. **Review the Project Budget**, and any other opportunities and allocations.
5. **Enter the funding** you are awarding for each expense type or enter a lump sum amount, and click the **Save Preliminary** button below the amount fields.
6. Under **Funder Discussion**, enter any comments you want to appear for other funding opportunities to which the student applies, and click the **Save Funder Comments** button.
6. To leave the award in a Preliminary status, you can return to the View Projects tab. 
To finalize the award, click the **Offer Final Awards on This Project** button. The page will be 
redisplayed with the award amount in the orange box at the top right of the Project Budget section. 
Once an award is made final, the student group leaders will receive an automated email notification 
from SAFE.

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

**Paying Awards**

Once a student group has been awarded funding and has met any additional requirements, you may 
transfer payment to the student group account or to the administering department.

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**Creating and Awarding Funder-Initiated Opportunities**

**Create a Funder-Initiated Opportunity**

The process for creating funder-initiated opportunities begins the same way as creating a student-initiated 
opportunity, but may be followed immediately by entering the awards because the funder is not waiting for 
students to apply.

1. The funding office enters the funding opportunity as described in “**Completing Entry of a Student-
Initiated Opportunity**” above, completing all information about the opportunity, but specifying the **Fund Request Initiation Type** as **Funder Initiated**. This prevents the opportunity from appearing in the search 
results for student funding searches.

*Note: The SAFE system may require you to input data into fields regularly required for student initiated 
activities, even though these fields will never be visible to students and will never appear in a student search. 
For application and publishing cycles, which are not truly relevant to funder initiated opportunities, you are 
advised to simply note the beginning and end dates of the fiscal year.*

**Make Awards on Funder-Initiated Opportunities**

1. Locate the funding opportunity on the **My Opportunities page** and click the **award funds** link.

2. On the **Funder Initiated Awards** page, start typing the **student group’s name** in the designated field. 
A list of names that match what you have typed is displayed. You can keep typing until the name you 
want appears, or scroll through the displayed list to find the name you want. When you select the 
name, it will appear in an orange box next to the field. Click the student group’s name to view the 
student group’s project history as well as other active projects.

*Note: It is important that you verify that none of the other "active projects" are the same as the one 
for which you are going to create a new record with this award. If there is already an existing 
project, you will need to select it from the drop down box and place your award into the existing 
project. Failure to do so will create a duplicate project on the student group’s behalf and cause 
confusion among funders. If you are awarding to an existing project, skip to step 6.*

3. Enter a **Project Title** that will appear in the student group’s project list, and be used for reporting.
4. Select the location of the project.

Note: The information you enter must be accurate as other funders will be reviewing the information to determine if this project is the same project they intend to fund.

5. Enter the start and end date of the project, making sure that the project is affiliated with the correct Funding Cycle displayed at the top of the page.

6. Enter the Amount of the award. If the award is fully funded, and the student may not apply for additional funding, click the fully funded checkbox. If the award is not fully funded, check the additional funding is allowed checkbox.

7. Select the Award Status (Final or Preliminary).

Final awards will send notification to the student group. Final Awards do not disburse funds and can still be edited or withdrawn by the funder for good cause (i.e. student group did not fulfill requirements, the group’s plans changed making them ineligible for the funding; funder wants to increase the amount). If you need to edit the award, please explain the reason for the change to the student group.

Note: The final award amount should always be updated to reflect what was actually paid—even after the project is complete. Other funders will need accurate information upon which to base their office’s funding decisions.

Preliminary Awards are a tool for funder planning purposes. Student group leaders are not notified of preliminary awards. Other funders can view preliminary awards and can communicate with one another in the Funder Comments field.

8. If you need to provide additional instructions to the student, or other comments, enter them in the Student Comments field.

9. Click the Post This Award button. This project will then be added to the list at the bottom of the page for your reference.

Note: You can take up to 3 actions for each posted project: View, Reopen Award, or Withdraw.

The View action allows you to view all of the student group’s project details.

The Reopen Award action allows the funder to make changes to the project title, the award amount, the award status (preliminary/final), and the additional funding is allowed field.

The Withdraw action allows the funder to withdraw the award. When withdrawing an award, the funder will be prompted to enter a short email message that will be sent to the student. The funder will enter a “subject” and “message” that will be emailed. This is to explain, in the funder’s own words, why the award was withdrawn.

Student Notification of Funder-Initiated Award

Once the funder makes the award FINAL, SAFE generates a notification email to the student. If the student is applying for funding to other funding offices, these offices can see the record 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 e-mail will indicate that a record has been initiated and they should go into the system to complete the application.

   b. When the student opens SAFE, it is already populated with all the demographic information and the award data provided by the funder. In addition, the system will generate a list of additional potential funders.

   c. The student should first accept the initial award and then complete the application, with the budget prepopulated with the initial award. The process proceeds as a normal student-initiated funding application from this point.

If additional funds are NOT allowed:
   a. The e-mail indicates that an award has been made and they will see this award in their history of awards.

   b. When the student opens the record, they will see the award plus the indication that no additional requests are allowed for this project.

   c. The student must accept the award before the specified deadline.

View Students' Post Project Information
During their project and after its completion, students can enter their actual expenses as well as upload receipts and reports or other documents.
To view this information, open the projects tab. Enter the criteria for the project(s) you wish to find.

Note that for "past" projects (projects in which the end date has passed), you will need to enter a value in the "find projects ____ days past the end date" field.

In the Actions column of the projects list, select the "post project requirements" link. This will open a new window displaying any of the "post project" information entered by the student.