



SAFE

Reference Guide

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SAFE Overview

The Student Activities Funding Engine (SAFE) is a system designed to make it easy to manage and find funding for various student activities, such as Senior Thesis Research, Summer Study Abroad, Internships, and Independent Work. In some cases, a funding office may make awards outside of SAFE but report them to SAFE to allow for effective stewardship of funds and to track a student's current and past funding. In most cases, though, funding offices will set up funding opportunities to which students can apply through SAFE, to support activities and projects that the students have identified. A student may search for any funding opportunity for which he or she is eligible.

The system allows funders to identify and post opportunities, review student applications, approve and award funds, and notify applicants. The system developers are working with Treasurer's to make it possible for funders to directly authorize the release of funds within SAFE, in addition to tracking the applicants and allocation of funds in SAFE.

Active students, as well as students who are on leave, will be able to search, view, and apply for funding opportunities, create student-initiated projects and request funding for them, receive notifications via email, and accept an award after reviewing any terms and conditions associated with it. Students will receive payments and complete the project outside of the SAFE funding portal, but can upload receipts in SAFE.

Funders	Student Applicants
Post funding opportunities – provide criteria and requirements	Search, view and apply for relevant funding opportunities
Review applications and see what other offices are contributing	
Award funds on preliminary and final basis; notify students	Accept or decline awards, sign off on terms and conditions & funder requirements; upload required docs like IRB approval, travel waivers
Authorize release of funds	After completion of activity, upload receipts and other required documents

SAFE is a web-based system that can be accessed from any location, using your Princeton netID and password to authenticate.

What should NOT be Recorded in SAFE

The following activities and funds should not be entered in SAFE:

- Prizes to recognize achievement
- Salary (including casual hourly appointments, “internships” that are really paid jobs)
- Financial Aid and Work/Study funds
- Financial assistance, including emergency assistance or hardship funding
- Payments that are entirely external to the University (never touching University accounts or administered by University departments; for example – funding provided by family; raised by the student via fundraisers; completely external support such as Rotary Club, or another philanthropic/non-profit organization; direct internship payment from hosting organization)
- Purchases of equipment that will be used by the student but remain the property of the department (including reimbursements to students who purchase materials that are considered to be department property).

SAFE Terms and Concepts

Activity Types

Currently, activity types that can be managed in SAFE include

- Summer Study Abroad
- Senior Thesis Research, on or off campus
- Junior Independent Work off campus
- Independent Projects (not qualifying as thesis research or JIW) off campus
- Off-campus internships (when the funding allocated through SAFE is NOT salary)
- Individual attendance at a conference, competition, performance, or similar event

In the future, additional activity types should be added to SAFE, including group travel (conferences, competitions, performances, or similar events); group extracurricular travel, including service trips; individual or group sponsored on-campus events, including speakers, lectures, parties, approved fundraisers, performances, and special events; and on-campus independent work or independent projects (beyond senior thesis research).

Funding Sources

If an opportunity is funded from any of the following sources, it should be included in SAFE.

- Dedicated university funds
- General university funding used to support undergraduate student activities
- Grant funding used to support student activities
- External funds (such as alumni clubs) that are managed and allocated by University departments
- Gift and restricted endowment/gift funds dedicated to particular relevant purposes
- Unspent prize money that has been reallocated to support student activities

For a list of activities and funding sources not included in SAFE, see "What should NOT be Recorded in SAFE," on page 6.

Opportunity Types

An opportunity may be student-initiated, funder-initiated, or a hybrid of the two.

- Student-Initiated opportunities occur when a student finds his/her own opportunity (internship, summer study abroad program, senior thesis research project, or other independent project off or on-campus), and asks one or more offices/programs to provide financial support.
- Funder-Initiated opportunities occur when a student is accepted into a particular activity directly by the funding office. This might include a department or program sponsored internship or special project for which the student applies. The funding opportunity and application process is managed outside of the SAFE portal, and only entered in SAFE when the funding has been awarded to the student. The internship or other activity comes fully funded or with a pre-set stipend or standard financial award.
- Hybrid opportunities occur when a SAFE record is initiated and awarded by the funding office for a funder-initiated opportunity, but the activity is only partially funded, and the funding office allows the student to seek additional support from other sources.

The procedure is different for each opportunity type:

Student Initiated	Funder Initiated	Hybrid (Funder to Student)
<ol style="list-style-type: none"> 1. Funding offices create student-initiated funding opportunities in SAFE. Note: Student-initiated opportunities will show up when students search for funding In SAFE. 2. The student searches for and selects funding opportunities to which s/he will apply. 3. The student creates a project (entering information about the specific activity into the system). 4. The student completes and submits an application specific to the activity type and funding opportunity. 5. When necessary, the student provides additional opportunity-specific materials to the relevant funding office. Note: All Funding Offices receiving the request can see each other's allocations to that student for that activity. 6. Funds are allocated on a preliminary and final basis from one or more funding opportunities. 	<ol style="list-style-type: none"> 1. The funding office manages student applications outside of SAFE, but creates the opportunity in SAFE as a Funder-Initiated opportunity. 2. When the funding has been awarded, the funding office enters the award in SAFE by clicking the Award funding action on the My Opportunities list, and then entering the student's name, the project title, the location and dates of activity, the amount awarded, the award status, and the deadline by which the student must accept the award. 3. The funding office notes if the activity is fully funded (the student is not allowed to seek additional funding from other sources) or if the student is allowed to seek additional funding in support of this activity. If the activity is not fully funded, and the student is allowed to seek additional support, this becomes a Hybrid record. 	<ol style="list-style-type: none"> 1. The funding office creates the opportunity and awards funding as in funder-initiated opportunities. 2. The student is notified via e-mail that s/he has been awarded funding from the originating Funding Office and that s/he is eligible to apply for additional support from other sources. 3. The student can open the record initiated by the Funding Office and resubmit it as a student-initiated request, with pre-populated information. The process continues as a standard Student Initiated request.

Roles and Functions

What you can do in the SAFE portal depends on what role you are assigned. The following table lists all the possible administrative roles in SAFE.

Role	Tasks/ Transactions	Typically Staffed by	Name
Super User	<p>Creates and maintains funding offices, and assigns funding office managers</p> <p>Creates and maintains activity types, and assigns activity type administrators</p> <p>Creates and maintains country groups</p>		<p>Diana Davies</p> <p>Beth Zawodniak</p> <p>IT Development team</p>

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Role	Tasks/ Transactions	Typically Staffed by	Name
Activity Type Manager	<p>Brings activity type funding offices together to determine type-specific questions, requirements and criteria.</p> <p>Serves as “top-up” funder for the activity type, if relevant.</p> <p>Makes changes to the activity type as needed after initial setup.</p> <p>Brings new funding offices to the attention of the Super Users.</p>	Varies By Activity Type	Robyn Howard (Senior Thesis Research), Elsie Sheidler (Internships), Martina Anderson (Study Abroad), Diana Davies (independent work and travel), Tom Dunne (non-research on-campus activities), staff in VPCL (group activities off campus)
Funding Office Manager (FOM)	<p>Creates funding opportunities and assigns the funding opportunity administrator (FOA).</p> <p>Gives access to FOAs.</p> <p>Trains new FOAs.</p> <p>May identify a proxy.</p>	<p>Academic Manager or Undergraduate Administrator in Dept.</p> <p>*Note: In some offices, the FOM and the FOA may be the same person</p>	
Funding Opportunity Administrator (FOA)	<p>Enters the specifics for the funding opportunity.</p> <p>Reviews applications for the funding opportunity, and approves advisors and department representatives.</p> <p>Awards funding, preliminary & final.</p> <p>Corresponds with applicants as needed.</p> <p>Updates award amounts, if necessary.</p> <p>Uploads funder-initiated information to SAFE.</p> <p>When the student’s project is complete, the FOA reviews the attached receipts.</p>	Undergraduate Administrator or multiple individuals in each department	
Dept. Rep.	<p>(for Sr. Thesis Research only)</p> <p>Evaluates the overall effectiveness and feasibility of the student’s proposal by answering questions in SAFE. They will receive a link to the site in an email.</p>	Dept. Rep.	

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Role	Tasks/ Transactions	Typically Staffed by	Name
Adviser	(for Sr. Thesis Research) Answers questions about the student's readiness and preparedness to carry out the project in SAFE. They will receive a link to the site in an email.	Usually a faculty member in the student's department	Entered by student on project application
Recommender	(for study abroad, 2 are required; for independent work, 1 is required) Assesses the student's academic motivation, abilities, and personal strengths in SAFE. They will receive a link to the site in an email.	Usually a staff or faculty member	Entered by student on project application

Getting Started

SAFE Navigation Basics

SAFE is a web-based system accessed through a URL in your browser. You will be required to authenticate through CAS by entering your netID and password.

When SAFE opens, you will see the Home page, which includes several modules:

- **What do you want to do?**
Lists the activities that you are authorized to perform
- **User Preferences**
Allows you to indicate whether you do or do not want to receive e-mail notifications
- **Your Messages**
Lists e-mail messages you have received. If you click on a message, the content of the message is displayed below the message list.

Across the top of the page are tabs. The tabs you see vary, depending on your role in the system. They may include Opportunities or Projects. From the Home page, you can access an activity by clicking on the link in the **What do you want to do?** module, or by clicking on a tab.

Requesting Access to SAFE

SAFE Super Users will initially set up all Funding Office Managers in SAFE and will notify FOMs once they have been given access. If your funding office has not been given access, please contact Diana Davies or Beth Zawodniak and be ready to identify your Funding Office name and Funding Office Manager. Funding Opportunity Administrators should be given access to their opportunity by the Funding Office Manager, as described on page 14.

Logging In

To log into SAFE,

1. Enter the URL 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 to log in.
4. The SAFE home page is displayed.

Who to Call When You Need Help

The Help Desk (dial 8-HELP, and select option 3) should always be your first point of contact if you have a problem in SAFE. They can take any information about your issue, and if they cannot resolve the issue themselves, they will contact the designated person for escalation of the issue.

Question	First Contact	Escalation Contact
SAFE Access	Help Desk	Beth Zawodniak
Senior Thesis Research	Help Desk	Robyn Howard
Internships	Help Desk	Elsie Sheidler
Independent Work	Help Desk	Diana Davies
Summer Study Abroad	Help Desk	Martina Anderson

Before Starting Checklist

Before entering any information into the SAFE system, it is best to understand your opportunities and potential candidate criteria. Included in this section are a series of questions and answers to help you plan for using SAFE.

For each of your opportunities, make sure you know the answers to the following questions:

- What activity type does this opportunity fall under? Activity types that are managed in SAFE include:
 - Senior Thesis Research, on or off campus
 - Off-campus internships (when the funding that is allocated through SAFE is NOT salary)
 - Summer Study Abroad
 - Independent Projects, including
 - Junior Independent Work off campus
 - Special Projects (not qualifying as Senior Thesis Research) off campus
 - Individual attendance at a conference, competition, performance, or similar event
- Is the opportunity funder-initiated or student-initiated?
- Is there a restriction on the duration or timing of the activity?
- Is the opportunity restricted to one or more concentrations?
- Is the opportunity restricted to students pursuing a specific certificate?
- Are there online forms, instructions, expense guidelines, or a website URL where students will find important information about the opportunity? You will be able to copy and paste these URLs into the funding opportunity form in SAFE.

For Activity Managers

Activity Managers are assigned to an activity type by the Super User when the activity type is created in SAFE. Currently, the only activity types managed in SAFE are Senior Thesis Research Funding, Internships, Summer Study Abroad, and Independent Work.

After working with the funding offices to determine activity type-specific questions, requirements, and criteria during the initial setup of SAFE, the activity manager is responsible for making any required changes to the activity type after the original setup of SAFE. These changes should be relatively rare and may only take place on an annual basis, except in the most urgent cases. In some cases, most notably, Senior Thesis Research funding, the activity manager also serves as the “top-up” funder for the activity type.

Activity Type Rules and Deadlines

This section describes the various Activity Types.

Senior Thesis Research Funding - Opportunities available for students to conduct research directly related to their senior thesis; individual guidelines and restrictions may apply.

Internships – up to 12 week, non-credit bearing opportunities, either pre-arranged specifically for Princeton students or initiated by the student, that allow undergraduates to participate in planned, supervised work that allow them to explore and/or inform their careers, academics, and/or extracurricular interests. The majority of internships occur during the summer. Most pre-arranged internships provide funding to offset travel, living, and/or project costs. In some cases, a funding opportunity may “top off” or provide additional funds in addition to any salary received but salary itself is not processed through SAFE.

Summer Study Abroad - Enrollment in a structured academic program of study. The program of study may include language study and/or discipline-based courses. Individual guidelines and restrictions may apply.

Independent Work – This category includes Junior Independent Work, counted as such by the student’s department, as well as academic, co-curricular or extra-curricular independent work that does not fall into any of the three categories above. This may include an individual student’s travel to a scholarly conference, participation in a competition, attendance at an event that is relevant to the student’s academic pursuits, and similar types of activities. This does not include travel simply for the sake of tourism or other activities that have no relevance to the student’s work and studies at Princeton. Because of the fluid and open nature of this category, funding opportunities in this group normally do not have a set deadline and applications are normally accepted on a rolling basis. For this reason, ***this is the only category in which a student’s application locks at the time of submission.***

For Funding Office Managers

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. 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.
3. 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.
4. 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.
5. Scroll down, if necessary, and make sure that *your* funding office appears in the Funding Office field.
6. If you are also the Funding Opportunity Administrator, continue with the procedure under Completing Entry of a Student-Initiated Opportunity on page 15.
7. Click the **Save** button to save the funding opportunity and assign it to the specified FOA.

For Funding Opportunity Administrators

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.

Completing Entry of a Student-Initiated Opportunity

When you are assigned as an administrator for a funding opportunity, you will need to complete the information in SAFE for that opportunity. The information you must supply falls into four areas:

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

Administrators for this Opportunity

The Funding Office Manager has already entered your name as the administrator for this opportunity. If desired, you can add one or more names of people who can help you manage this funding opportunity, or fill in for you when you are away.

Field	What to do	Usage Tip
Add Opportunity Admin	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	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

Field	What to do	Usage Tip
	name. To remove an administrator, click the red-framed X in front of the name you want to remove.	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.

Fund Information Fields

This section provides the student with an overview of the opportunity. The Title will have been entered by the Funding Office Manager, who may also have entered information in other fields. You may change the information entered by the Funding Office Manager, if necessary. The following table lists the fields and provides some tips as to what should be entered in each, and how the field is used. Fields in red are required.

Field	What to do	Usage Tip
Title	You should not need to make any changes to this field.	Entered by the FOM.
Short Description	Enter up to 10 characters that can identify this funding opportunity	Used in internal reports to identify the opportunity.
Funding Office	Your funding office should appear as the default.	You should never enter an opportunity managed by another office. If you simply transfer funds directly to another office for awards that they administer, they will manage the funding opportunity and note you as a funding source.
Contact Name	Enter the name of the person who should be contacted by a student wishing more information.	This must be an active Princeton employee.
Contact email	Enter the email address of the person specified as the contact.	Be sure to include the full address, for example, lean@princeton.edu , 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.
Website URL	If the funding opportunity has a website with more information, enter the URL of that website here.	Having a website to which you can send students for additional information is very helpful. This is an optional field.
Fund Opportunity Description	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.	The content of this field will appear in the student email.

Field	What to do	Usage Tip
Expense Guidelines URL	Enter the URL of the web page that has the expense guidelines for the students applying for this opportunity (if relevant).	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.
Fund Request Initiation Type	Select Student-Initiated if you want students to be able to find this opportunity in a search.	See "Opportunity Types" on page 7 for more information on the differences between Student-Initiated and Funder-Initiated opportunities.
Application Questions	To see the questions the student must answer, click the Student Form Questions 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.	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.

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.

Field	What to do	Usage Tip
Activity Type	Select the type of activity to which this funding opportunity can be applied. (See "Activity Types", on page 7, for more information.)	If you have funding available for more than one type of activity, you will need to create a separate funding opportunity for each activity type.
Funding Amount Restrictions	Select the applicable funding amount restrictions: No restrictions – the student will be able to apply for additional funding. Fully Funded – the student will not be able to apply for additional funding. Fixed – the student will receive only the Fixed Amount you specify for this opportunity. Range – the student may receive funds within the Range you specify for this opportunity.	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.
Recipient Type	Check the Undergraduate Students checkbox to restrict the opportunity	At this time, only undergraduates are able to use the SAFE portal.

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Field	What to do	Usage Tip
	to undergraduates	
Certificates	Select ALL , or select one or more certificate programs.	If you select one or multiple certificate programs, <i>only</i> those students who express an interest in the specified certificate(s) will see your opportunity. If you select one or more certificate programs AND select one or more plans/departments (concentrations) the search will function as EITHER/OR not BOTH/AND. In other words, by clicking on certificate A and department (concentration) B, you are NOT limiting your matching criteria to students who are pursuing both certificate A and concentration B, but opening the match criteria to students who are pursuing one or the other.
Activity Location	Specify any restrictions on the location where the student will perform the activity. You may select multiple locations. If you select Off Campus (International) , you can further restrict the location to a specific country or group of countries.	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.
Time Restrictions	Check each time period when the activity may be performed. You may select multiple time periods.	The opportunity will show up only in those searches for which the student specifies the time period(s) you selected. For maximum availability, select all time periods.
Program (AB, BSE or Undecided)	Check each program for which the opportunity is available. You may select multiple programs.	Don't forget to select Undecided if you want the opportunity to appear for Sophomores or Freshmen.
Plan/ Department (concentration)	Select the departments or plans for which the opportunity is available. You may select multiple plans, or All .	Selecting All is the least restrictive. Otherwise, only those students in the specified plan or department will see the opportunity in their searches.
Duration	Check all activity durations that are allowed.	Only students who select the same duration you checked will see this opportunity. Duration is presented as a filtering field because some funders will only support activities of a minimum

Field	What to do	Usage Tip
		duration.
Other Fund Restrictions (will appear to applicants)	Enter any restrictions that you want students to know about.	This does not restrict what appears in student searches.
Additional Application Instructions	Enter instructions for the students who want to apply, if there are application steps outside of the SAFE funding portal.	These instructions appear to the applicant when the project proposal is submitted.
Website Link to Instructions	If you have a website with instructions for applicants outside of the SAFE portal, enter the URL here.	You can test the link to be sure it was entered correctly. The web page will open in a new window.

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/ for deadline details).

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

Field	What to do	Usage Tip
Application Period	Enter the start and end date when the students may apply for this funding opportunity.	Make sure the application period does not end before the Publishing Period.
Publishing Period	Enter the start and end date when you want this opportunity to appear in student searches	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.

Field	What to do	Usage Tip
Funding Period	Enter the date range during which your department expects to be completing the review of applications and awarding funding.	These dates help students and other funders know when they should expect to see an award from your office.
Cycle Name	Enter a name for the cycle that will identify it internally.	When an opportunity is offered in multiple cycles, the Cycle Name helps to identify which opportunity this is, and when it will be awarded.
Applicant Message	In most cases, you will leave this field blank	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.
Class Year(s)	Select the classes who may apply for this funding opportunity. You may select multiple class years. To select multiple classes, hold the control button while selecting.	Keep in mind that if your opportunity is for a summer period, graduating seniors should not be selected.

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. You should be sure to name each new cycle and make sure the relevant class years are updated to reflect the change in timing. 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.

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.

Entering and Awarding Funder-Initiated Opportunities

The process for funder-initiated opportunities begins the same way, but may be followed immediately by entering the awards.

1. The funding office enters the funding opportunity as described in "Completing Entry of a Student-Initiated Opportunity", on page 15, completing all information about the opportunity, but specifying the Fund Request Initiation Type of **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.

2. When you are ready to make awards, locate the funding opportunity on the My Opportunities page and click the **award funds** link.
3. On the Funder Initiated Awards page, start typing the student's name. 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, with information that helps to identify the person. You can click the student's name to see what projects the student's project history and active projects.
4. Enter a Project Title that will appear in the student's project list, and be used for reporting.
5. Select the location of the project.
6. 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.
7. 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.

NOTE: *In some very rare cases (most notably PICS), funder-initiated funders that mix Princeton administered funds with funds that never flow through Princeton may note **fully funded** in the allocation field instead of entering a specific dollar amount. When the awards are complete for a given funding cycle, the funder indicates that the awards are all final and enters the total amount of funding distributed among all of the students for a particular funding opportunity for a particular funding cycle. In the students' records, the funding is evenly distributed among all students in that funding opportunity cycle.*

8. Select the award status (**Final** or **Preliminary**).
9. Enter the date by which the student must accept the award in the Deadline to Accept field.
10. If you need to provide additional instructions to the student, or other comments, enter them in the Student Comments field.
11. Click the **Post This Award** button. The project will be added to the list at the bottom of the page. Note that you can take up to 4 actions for each posted project: **View**, **Edit**, **Withdraw**, or **Remind**. The **Remind** action sends an email reminder to the student that they have not yet accepted the award.
12. The student is notified of the award in an email. 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.
 - 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 normal 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.
- c. The student must accept the award before the specified deadline.

Allowing a Student to Apply Post-Deadline

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.

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. Click the **View Projects** tab or the **Award Funding to Projects** link on the SAFE Home page 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. Make sure the Funding Office displayed is your own.
4. At this point, you can click **Find Projects** to see all projects in your funding office. However, if you want to restrict your search, you can enter values in any of the following fields:

Field	What to do	Usage Tip
Show project ___ days past end date	Enter a positive value in the field to see only projects that have been completed. Otherwise, leave the default value.	
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 .	If you want to see both Not Reviewed projects and projects with Preliminary awards, use the <i>Quick Search</i> field.
Quick Search	Use this field to find all projects with an award status <i>other than Final</i> .	Use this instead of Award when you want to see both Not Reviewed projects and projects with Preliminary awards.

Field	What to do	Usage Tip
Applicant	Enter the name of the applicant whose project(s) you want to see.	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.

5. Click the **Find Projects** button to list the projects that match your search criteria.
Note: To start a new search with entirely different criteria, you can click the **Clear** button to clear all the fields and return them to default values.
6. The projects that match your criteria are listed at the bottom of the page. To view a project, click the **view project** link under Actions, at the right.
7. 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 page to print a copy of the application.
 - Display any documents the student has attached, by clicking the **Document** link in the Documents section. [Note: you can only verify documents on the Award funding page.]
 - Scroll to the bottom to review the applicable advisor, department representative, and recommender responses.

Awarding Funding for a Student-Initiated Opportunity

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

1. Search for the student’s project (as described in “Viewing Project Applications”, on page22.
2. Locate the project for which you want to award funding and select the **award funding** Action.
3. Review the application and any attachments. When you have verified the attached documents, click the **Verify** Action.
4. Review the Project Budget, and any other opportunities and allocations.
5. Enter the funding you are awarding for each expense type, 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.
7. To leave the award in a Preliminary status, you can return to the View Projects tab.
To finalize the award, click the **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.
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.

FYI: How SAFE Works for Students

A brief overview of what students see and do in SAFE is included here.

What Can Students Do in SAFE?

Students have the ability to:

1. Search for funding opportunities based on their own search criteria, and identify the opportunities that match those criteria.
2. Create/Start projects for which they want to find funding, view their projects, and change their projects.
3. Apply to one or more funding offices/opportunities by completing application form(s) and uploading supporting materials. They can submit the application, or save it for completion at a later time.
4. Learn about and be re-directed to funder-initiated opportunities.
5. Apply to Additional Funding Opportunities (Add Chosen Opportunities to an Existing Project).
6. Receive Email notifications throughout the process.
7. Load expense reports and receipts after the funded activity is completed.

Note: Only active students, and students currently on leave, are eligible to search for funding opportunities in SAFE.

How Does a Student Find Funding and Start a Project?

The information entered by the Funding Opportunity Administrators drives the SAFE search engine. **The publish date entered by the FOA will determine when and if a student can find an opportunity.**

The student begins by selecting Start a Project. This opens the search window, where the student enters their criteria. When searching for funding, the student must enter the activity type, time period, and location, and for some activity types, the duration of the activity. The student must also enter his/her program of study (AB or BSE) and intended major/concentration if these have not yet been declared and are not pulled directly from the student information system. Students may also select one or more certificate programs they are planning to complete.

Once the student enters their search criteria, SAFE will seek matching opportunities and generate a list of opportunities. Students may see opportunities that do not yet have an active application status but can only apply for those opportunities for which the application period has already opened. The student can select one or more active opportunities, and then click the Apply button. Only at this point can the student create their project.

If no funding opportunities match the student's criteria, they can still create a project without a funding opportunity. They can then come back later to search for funding opportunities for that project.

Completing an Application for Funding

The questions a student must answer when applying for a funding opportunity vary with the type of activity. In some cases, specific opportunities will also have additional questions or requirements, specified by the funding office when they entered the opportunity, and these will be answered outside of SAFE. In general, the student will be required to enter a title for the project, and a start and end date in the Project Details section. The funding opportunities selected by the student will be listed in the Funding Requests section, just below the Project Details section. If the student wants to add additional funding opportunities to his/her project, he/she can do it by clicking the button in this section.

Next, the student must enter their anticipated expenses (for the budget line items that have been determined for the relevant activity type, as well as “other”), providing a description of the expense, the cost per unit, and the number of units. (For example, lodging might cost \$50 per night. Each night’s lodging is one unit. In other cases, there may be just one unit for a budget line. Items like “fee” or “tuition” can only be one unit.) The total cost can be calculated by clicking the Update Totals button, and the student is free to enter a different amount in the Total Requested field for that line. Students can add and remove lines in this section as needed.

Tip! An error message will appear if a student leaves a budget line showing less than one dollar of total cost. If a given budget line is not relevant, it should be deleted. On the other hand, a student may show a number > 1 on the total cost, yet have a request of zero – for example, if a student will be using frequent flier miles to cover the cost of airfare. By noting a total cost but then making a request of zero for that budget item, the student is indicating to funders that s/he knows that there will be a cost for a given item (such as airfare) but that s/he is not making a request for funding to cover that particular cost (again, as in the case when a student’s airfare is covered by frequent flier miles).

CV, resume, transcripts, and other documents are listed in the Documents section of the application as links which, when clicked, open the document in a new browser window. To add or remove documents, the student clicks the Upload and Manage Project Documents link, which opens the Manage Documents window. A **Back to Project** button at the bottom of the page returns the student to the application.

Tip! Only PDF documents can be uploaded to SAFE.

The questions specific to the activity type are listed below the Documents section. If the student cannot complete the application in one session, they can click **Save and Exit** to save their entries and return to complete the application at a later time. When the student has answered all the questions in this section, he or she can click **Continue** to see remaining steps that need to be taken outside of SAFE, review and sign off on relevant terms and conditions, and submit the project proposal.

Viewing Projects

Students can view their projects by clicking the View My Projects button on their Home page, or clicking the My Projects tab. From the My Projects tab, students can edit the project, upload documents for the project, and upload receipts when the project has been completed. In addition, students can withdraw a project if, for example, they have applied under the wrong activity type.

Changing a Project

Students applying for student-initiated opportunities can change and edit their applications (except for basic search criteria such as activity type, location, and timing of the project) at any time UP UNTIL THE FIRST DEADLINE OF THE FUNDING OPPORTUNITIES TO WHICH THE STUDENT HAS APPLIED. Once the first deadline is reached, the student’s application is locked and no additional changes can be made. The only exception to this rule is the activity type Independent Work. Because funding opportunities for this activity type normally have no set deadline and because applications may be received on a rolling basis, for Independent Work ONLY the student’s application will lock at the time it is completed and submitted. The only elements of the application that can be changed or amended after an application is locked are certain document uploads such as travel waivers, and IRB and IACUC approvals. Students may also write notes into a field designed for this purpose.

Uploading Receipts and Final Reports

When the project has been completed, the student must upload receipts as scanned PDF documents. Depending on the activity type, other post-activity documents may also be required, such as a final

report. To upload documents, the student clicks on “My projects” from his/her landing page where the full list of active, past, and pending projects is listed. The student may click on “upload receipts” or “upload documents” to complete these functions.

Glossary

Activity Type

Any experience outside the classroom which furthers a student's learning. Defined Activity Types include: Senior Thesis Research, (Summer) Study Abroad, Internships, Independent Work (including Junior Independent Work and special projects such as individual student travel to conferences and events). For each activity type, funding offices share a common set of requirements for student applications, review, evaluation, allocation, and tracking. Activity types covered in future releases of the SAFE will include group activities off campus and group activities on campus, including Projects Board funded events. Currently, only undergraduate activities are covered in SAFE but future releases may include certain graduate student activities.

Activity Type Manager

The person who manages a given activity type, including coordinating with funders under that activity type to define and adjust activity-type specific questions and requirements.

Application Cycle

The time period during which students may apply for and be awarded specific funding opportunities. This period varies for different funding opportunities. With SAFE, the overall Activity Types dictate the maximum range of deadline dates, and each opportunity within the Activity Type can have unique deadline dates within that range. In the case of Senior Thesis Research Funding, specific deadlines have already been defined by the Office of the Dean of the College.

Application Period

The date range during which applications for a funding opportunity are open and active, and will be accepted.

Eligibility Criteria

The criteria that will determine both who is eligible to receive the funding, and which students will be able to find the opportunity when searching for funding. The more specific your criteria, the more you will limit the appearance of your opportunity in a student search.

Fund Request Initiation Type

A funding opportunity may be Funder Initiated or Student Initiated.

Funder

Individuals who provide funds as part of a funding office. Funders identify funding opportunities, define selection criteria, and award funds to applicants.

Funder-Initiated Opportunity/Activity

Opportunities developed and pre-arranged by a Princeton entity or individual, that come packaged with specific funds. This might include a department or program-sponsored internship or special project. The opportunity normally comes fully funded or with a pre-set stipend or standard financial award. In SAFE, the opportunity is created, entered, and managed by the funding office (department, center, or program). The student applies and is accepted into a particular activity by the funding office, outside of SAFE.

Funding

Any monetary allocation (outside of financial aid, salaries, and special prizes) which is provided to support undergraduate student academic, co-curricular or extracurricular activities.

Funding Office Manager

The person in the funding office who creates funding opportunities and assigns other individuals in their department as Funding Opportunity Administrators for those opportunities. The Funding Office Manager does not complete the funding opportunity, but only creates it. If the Funding Office Manager needs to complete or manage a funding opportunity, he or she must assign him or herself to the opportunity as a Funding Opportunity Administrator. Typically, the Funding Office Manager is the Undergraduate Administrator in the department. In some cases, the Funding Office Manager and the Funding Opportunity Administrator will be the same person.

Funding Office

Any Princeton-based office, department, recognized group, program, or grant-funded project that provides money to individual undergraduates or student groups for relevant activities.

Funding Opportunity Administrator

The person who typically enters and manages individual funding opportunities for their department.

Funding Opportunity

Funding available for a specific set of criteria and associated with a specific activity type.

Funding Period

The date range during which the department normally completes its review of applications and awards funding.

Funding Source

May be a departmental budget allocation, grant, or dedicated fund; may include funds that originate from outside the University (such as an alumni club) but are routed through University accounts.

Hybrid Opportunity

A SAFE record is initiated by the Funding Office for a Funder-Initiated Activity; however, the activity is only partially funded and the Funding Office allows the student to seek additional support from other sources.

Publishing Period

The date range when the opportunity will appear in student searches.

Student-Initiated Opportunity/Activity

The student identifies an activity/project/program, and then seeks and applies for funds. In SAFE, the student creates a project (internship, summer study abroad program, senior thesis research project, other independent project or on-campus activity), and then searches for and applies for funding for that project.

Super User

The person with the highest authorization in the system, who can create activity types and funding offices. The super user is able to authorize other individuals as Activity Type Managers, Funding Office Managers, and, if they create a funding opportunity, Funding Opportunity Administrators.