



Overview:

When a pre-proposal includes a detailed budget, this record will be submitted to routing for OSP budget review, then held pending an invitation for a full proposal. If invited, the PD record will be recalled and updated with full proposal content.

The February 2025 routing change to move OSP budget review into KR PD routing will affect how pre-proposals with detailed budgets are reviewed. The same record is used for both pre-proposal and full proposal content.

Procedure:

For a pre-proposal record with detailed budget that requires review, the KR PD record must be submitted to routing to trigger the OSP Budget and Business Section Review, but a pre-proposal record does not fully route.

- Proposal Type must be 'Pre-Proposal'
- Budget:
 - The 'for submission' budget version name should include 'Pre-proposal'
- Attachments
 - **Proposal** section should include a placeholder for the pre-proposal as submitted
 - **Notes** section should include the deadline date information for both the pre-proposal and full proposal if invited.
- Data validation errors must be fixed; warnings should be addressed as applicable.

After the OSP budget/business section approval, a pre-proposal record will be held in routing at a new stop: **OSP Pre-Proposal Hold for Invitation Decision.**

Proposal workload assignments							
↑ Proposal Number	Principal Investigator	Sponsor	Lead Unit	Title	Due Date	Last Action	Current Request(s)
#155505	Irey, Shannon K	DOE-US Department of Energy	CO-1377	CLC.23Oct2024 - pre-proposal hold test	11/01/2024	01/16/2025 2:09 PM	OSP Pre-Proposal Hold for Invitation Decision

The record can be left in routing to await the decision about a full proposal submission, or it can be recalled and left in 'Revisions Requested' status until a decision.

- If invited:
 - The KR PD record must be recalled if this has not already been done.
 - Proposal Type must be changed to New
 - Deadline Date must be updated to the full proposal submission deadline
 - A budget version for the full proposal must be created
 - This can be a copy of the pre-proposal budget, with a new name
 - Attachments for the full invited proposal should be added to the record
 - Questionnaire answers and Supplemental Information should be reviewed and updated as applicable for the full proposal submission
- If not invited:
 - If still in routing at the 'Hold' level, record must be recalled or returned.
 - Restore the deadline to the date the pre-proposal was due
 - Add 'NOT INVITED' to the beginning of the title
 - Cancel the record