Pre-Proposals

Some sponsors may issue calls for pre-proposals that will go through an initial review process. Only if the pre-proposal is selected will the sponsor extend an invitation for a full application. If your pre-proposal is selected for funding, UTRMS Grants allows users to transfer data already captured in the pre-proposal into full funding proposal record. The second section of this guide provides steps on converting a pre-proposal to a full proposal.

Create and Tag the Pre-Proposal

1. Initiate the funding proposal. Pre-proposals are entered into UTRMS the same way as a full funding proposal. Please follow the How to Create a Proposal guide for detailed steps.

2. Tag the record as a pre-proposal. To make OSP aware that this is a pre-proposal, navigate to your funding proposal workspace and click Manage Tags.

3. In the Manage Tags pop-up, click the Browse [...] button and select Pre-Proposal.

4. Click OK.
Convert a Pre-Proposal to a Full Proposal

1. Navigate to the proposal workspace for the selected pre-proposal in Grants.

2. Click **Copy** to create a copy of the proposal. (The copy will be assigned a new FP number, which you can find in the History tab of the existing pre-proposal record.)

3. Remove the Pre-Proposal tag from the copied proposal you just created by clicking **Manage Tags**.

4. Click **X** to remove the Pre-Proposal tag, then click **OK**.

5. Update the copied proposal as needed with your full funding proposal’s information. Please refer to the [How to Create a Proposal](#) guide for detailed steps.