

Invoice Guidance

Information on your invoice should include:

1. Each invoice should be for a three-month period, in arrears.
2. All claims should match the breakdown provided with the award letter. **Any deviations from this breakdown should be approved by BHF in advance of any expenditure being incurred.**
3. The BHF Grant Award number.
4. The title of the project/programme and Principal Investigator
5. The period the claim covers using exact dates, e.g. 01.01.2023 to 31.03.2023.
6. Ensure the correct budget heading is used, e.g. **Salaries, Expenses, Animal Research Costs, Equipment**. Please refer to our Award Letter that details the cost breakdown of all eligible items on the grant.
7. The full name and contact details (email address) of the Finance person dealing with the invoice.

Salary Claims

8. Each salary claim should be for a person either named on the grant application, or subsequently approved by BHF.
9. If the salary cost incurred for named staff is less than the three-month period that the invoice covers, please provide exact dates e.g. 01.01.2023 to 15.03.2023.
10. Each salary claim should be broken down by basic salary, LA if applicable, NI and pension. The salary level should match what was awarded/approved, unless any deviation to this has been explicitly approved by BHF in advance.
11. Each salary claim should indicate which post the claim relates to, matching the breakdown provided at award or the post number given in BHF's approval.
12. BHF will not reimburse pay increases beyond annual increments if awarded in the grant and nationally agreed pay awards.
13. If an employee has received a discretionary pay increase from a university, the difference between the awarded salary and the higher salary must be met from other sources. BHF should be invoiced at the awarded salary only.
14. BHF will not reimburse back pay for periods prior to someone being appointed to a grant. If back pay is due because of retrospectively applied national pay awards, please make this clear on the invoice and separate the back pay from the usual salary claim.
15. BHF will not reimburse unclaimed holiday or redundancy payments.
16. BHF will not reimburse salary costs where staff overlap; only one person is permitted in post at a time (unless a job share).
17. **Chair awards: If staff members are being claimed from the discretionary fund, please make this clear on the invoice.**

PhD Studentship Claims

18. Each claim should be for the student(s) named on the grant.
19. Please provide the exact start date on the first invoice.
20. If the stipend cost is less than the three-month period that the invoice covers, please provide exact dates.
21. Each claim should be broken down by stipend, fees, consumables, animal research costs.

Equipment Claims

22. **All** items of equipment claimed on invoices should include the backing purchase invoice. VAT will not be reimbursed by BHF.
23. Chair awards: It should be made clear on the invoice if equipment is being claimed from any awarded equipment budget including the equipment item number, or from the discretionary fund.
24. Please make clear on the invoice which awarded item of equipment is being claimed. This should not deviate from the award breakdown at the time of award, unless explicitly approved by BHF **in advance**.

Travel Claims (BHF Travel Fund)

25. See the BHF Travel Fund Policy [Travel Claim Form and guidance \(TVL\)](#)
26. See Grant Costing Guide for eligible costs <https://www.bhf.org.uk/for-professionals/information-for-researchers/how-to-apply/grant-costing-guide>

Training courses (when awarded)

27. Claims must include course details as per the award, plus itemised receipts.

Chair Awards: Discretionary Claims

28. Each claim from the discretionary fund should come with a full breakdown.
29. Please consult the BHF costing guide for items which cannot be claimed – e.g. stationery, furniture, recruitment costs <https://www.bhf.org.uk/for-professionals/information-for-researchers/how-to-apply/grant-costing-guide>
30. All items claimed from the discretionary fund must be research costs of some kind, including travel for conferences or to relevant meetings.
31. We do not require a travel form for claims from the discretionary fund but if it's not clear that claimed travel is research-related, this may be queried. Minimising carbon output should always be considered.

Chair Awards: Scholarship Scheme Claims

32. These should only be made for individuals who have been explicitly approved by BHF for appointment to the Scholarship Scheme. The start date and salary should match what was approved, unless any deviation has been explicitly approved in advance by BHF.
33. Salary claims must be broken down by basic salary, LA if applicable, pension and NI.
34. A person can only be claimed on the Scholarship Scheme for a period of up to 15 months and only one individual can be appointed to the Scheme at any one time.

Date last revised: June 2026