

1. Payment

- UK Biobank requires payment of an Access fee(s) for every application:
 - A main payment: due after the application is approved and before data is released.
 - Other payment: another payment may be required if we receive an additional request for bulk data when none was originally selected or if further work is required after a project is underway.
- To access the Payment section of an application:
 - Click on 'Applications' in the AMS navigation pane.
 - Click on 'View/Edit' next to the relevant application, then select the 'Payments' tab where 'Requests for Payment' and 'Financial documents' will be visible.

1.1 Making a payment:

- Upon submission of an application, the AMS will generate a request for payment which will be visible in the 'Request for Payment' area:

Application Form Collaborators Payments				
Requests for Payment				
Description	Value (£)	Tax	Total	Status
Initial	1.00	0.00	1.00	Requested
Payment details				

- AMS provides options to:
 - Create an Invoice with or without a PO number.
 - Pay online via SagePay.
- Once you are ready to make an online payment or would like to request an invoice, click the 'Payment Details' button that appears next to the requests for payment. This will open up the 'Payment details' form with Institute, Applicant PI name, department and Institute City, County/State and Country pre-populated (see below). **NOTE:** Only the Applicant Institute can pay the invoice.
 - Complete the form as appropriate.
 - Add a Purchase Order number if relevant.

Please note: Once an invoice has been generated a PO number cannot be added.

- Confirm that all details are correct by ticking the checkbox.
- The Applicant PI may then choose to:
 - Request Invoice: to generate an invoice in the 'Financial documents' area of the Payments tab.
 - Pay Online: to progress to SagePay and pay online via credit card.
 - Save for later: to save details and return to the 'Payments' tab.

Project details Collaborators **Payments**

Payment details

Please provide your payment details below to support either payment online or invoice request. You may optionally provide detail of an alternative institute that you would like to pay on your behalf.

Institute:

PI Institute will make payment ☒

PI First name:

PI Last name:

Department:

* Address line 1:

Address line 2:

* Postcode:

City:

Country/State:

Country:

PO Number (if relevant):

I confirm that all details are correct ☒

[Request Invoice](#) [Pay Online](#) [Save for later](#)

[Go back](#)

- If you request an invoice, an invoice will be generated and the application payment Status will update to 'Invoiced'.
 - The invoice will be available to download as a .pdf document by clicking the invoice document number.

Application Form

Collaborators

Payments

Requests for Payment

Description	Value (£)	Tax	Total	Status	
Initial	1.00	0.00	1.00	Invoiced	Payment details

Financial documents

Description	Doc. No.	Type	Date
Initial	AQT00001	Quote	10-Jan-2018
Initial	INV01002	Invoice	10-Jan-2018

If you choose to pay online, you will be redirected to SagePay where you can pay by card. Click on 'Confirm card details' to make your payment:



UK BioBank Ltd

Order description: Initial application fee

To pay
252.50 GBP

How do you want to pay?

 Visa

 Visa Debit

 Visa Electron

 MasterCard

 Debit MasterCard

[Cancel](#)

Your payment is secured by 

The screenshot shows the 'Your card details' page on the UK Biobank website. On the left, the UK Biobank logo and name are displayed, along with the order description 'Initial application fee' and the amount 'To pay 252.50 GBP'. The main section contains form fields for 'Name' (Ivan Pavlov), 'Card' (0000 0000 0000 0000), 'Expiry' (MM / YY), and 'CVC' (123). A green 'Confirm card details' button is at the bottom right. A green footer bar states 'Your payment is secured by sage pay'.

1.2 Payment / Shipping Information

- Please note that the section 'VAT Status' will only be visible if the country in the payment section is a member of the EU. Please refer to [UK Biobank's VAT note](#) on the UK Biobank website for further details regarding VAT and the impact on researchers.
- The Shipping address will be the same as the billing address unless the 'Shipping address different than billing address?' box is checked. If checked, new address fields which must be populated will become visible.
- Please note that the following fields are mandatory:
 - Institute Name
 - Contact first and last names
 - Address line 1
 - Postcode
 - I confirm that all details are correct
- To help UK Biobank locate your payment, please send any remittance provided by your Finance Department to creditcontrol@ukbiobank.ac.uk

1.3 Generating a receipt

- Once payment is confirmed by UK Biobank, the status of the request for payment will be updated to 'Paid' and the 'Request Receipt' button will appear in the Payments tab. Click this button to generate a receipt:

Requests for Payment					
Description	Value (£)	Tax	Total	Status	
Initial application fee	250.00	50.00	300.00	Paid	Request receipt

- Receipts will appear in the 'Financial documents' area where they can be downloaded as a .pdf document:

Financial documents			
Description	Doc. No.	Type	Date
Initial application fee	INV00081	Invoice	08-Nov-2017
Initial application fee	REC00016	Receipt	10-Jan-2018