

SOP: Accessing Encounter Forms in TaifaCare

[Last updated: Aug 2025]

Tasks:	How to document accessing different forms offered to a client in TaifaCare OpenMRS 3.x platform
Objective:	Successfully Log into TaifaCare, Access forms, and document the details in TaifaCare
Who:	All facility staff responsible for providing care to patients
Required Materials:	Username, password, computer with TaifaCare 19.2.0 and above, patient name, ID, and/or age

Introduction:

TaifaCare has been enhanced to support comprehensive documentation of different clinical forms. These forms are available based on the user characteristics and the various programs they are enrolled into.

Step	Step	Action
Step 1	Login to TaifaCare. Enter the application server URL system. “[ServerIpAddress:8080/openmrs]” and click on the load button or Enter key from the keyboard. On successful loading, you will be navigated to the system login page. Authenticate entry by providing username and password on the fields and click “Login” Upon successful login, you will be navigated to TaifaCare Home Page. Successful login will direct you to the TaifaCare Home Page where the landing page is displayed based on the user role.	 NB: With valid username and password, clicking Log in will take you to the TaifaCare home page. Otherwise, you will receive a prompt for wrong username or password.

Step 2

Locating the Forms

- From the landing page, select the client of interest from the active line list.
- If the facility EMR has been configured with service Queues, go to a dedicated service queue and pick a specific client.
- If a client is not available on the active line list, proceed to search for a client as illustrated below.

Active Visits

Filter table

Visit Time	ID Number	Name	Gender	Age	Visit Type
Today, 16:23	MGFKEJ	Maringich Maringich Maringich	M	18	Outpatient
20-Mar-2024, 17:21	MGK67Y	my email Gmail	F	24	Outpatient
20-Mar-2024, 16:08	MGK69W	Nyandi PT EMR	M	24	Outpatient
20-Mar-2024, 15:34	MGK647	Rose Awino James	F	27	Outpatient
20-Mar-2024, 15:25	MGK4VK	hesbon atieno atieno	M	31	Outpatient
20-Mar-2024, 15:25	MGK63A	Dorine Akiinyi Onyango	F	34	Outpatient
20-Mar-2024, 15:23	MGK4WH	Newton LAWI Isack	M	31	Outpatient

Patients Currently In Queue

Add patient to queue +

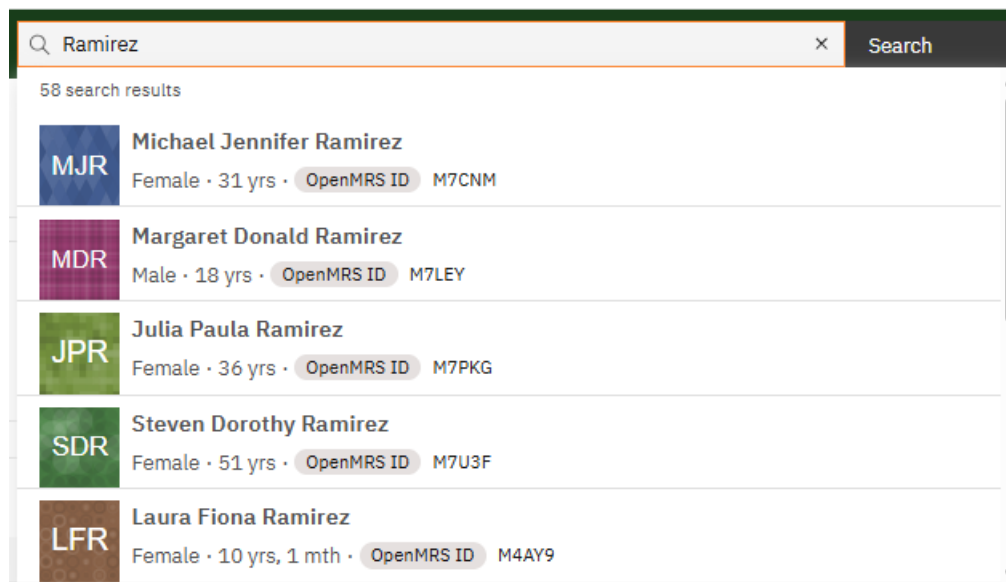
Filter by service: All					Filter by status: All				Clear queue
Name	Queue Number	Coming from	Priority	Status	Queue	Wait time	Serve Patient	Actions	
MARY MARY MARY	CLI-006	--	Urgent	Waiting	Clinical consultation	131 hour(s) and 2 minute(s)		Transition	
Muraya Muraya Muraya	TRI-015	Triage service	Not Urgent	Finished service	Pharmacy	4306 hour(s) and 37 minute(s)		Transition	
Muraya Muraya Muraya	TRI-015	Triage service	Not Urgent	Finished service	Pharmacy	4306 hour(s) and 37 minute(s)		Transition	

Step 3 Searching for patient

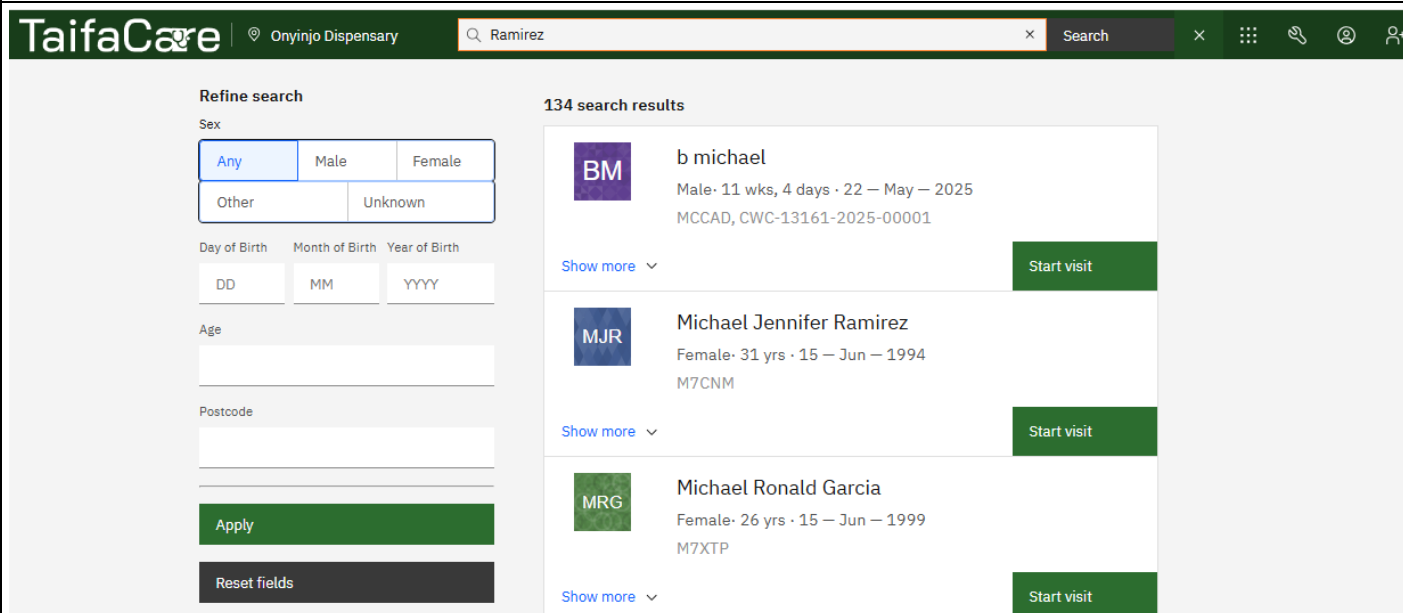
- List of clients scheduled for the day will be listed on the screen as shown.
- If the patient of interest is not listed, search for the patient.

Click on the “Search button”  at the top right to open the search window.

- Type the name or Patient ID into the designated field. As you input the identifier, a list of potential matches will be displayed



- To conduct a refined search, input the patient’s name on the search bar then press the “ENTER” key to initiate the search.
- Under refine search, specify the client sex, date of birth (if known), client age, phone number (if available) and postal code where applicable. Upon entering the details, click on ‘Apply’ or else click on ‘Reset Fields’



Step 4

Check in the patient.

- To start the process of accessing a form, you need to Check-in the client by clicking on ‘**Actions**’, from the list click on ‘**Check-in**’ as shown in the figure.

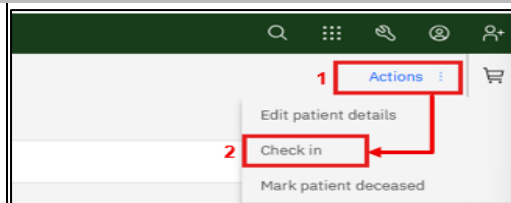
- Select the relevant visit option depending on nature of client visit:

- New** – This option is selected by default on clicking “Check-in”. It will pick the exact time you’ll click on the ‘Start visit’ button to start the visit.
- Ongoing** – Select this option if the client was already receiving services in the facility
- In the Past** – Select this option if you would want to do **Retrospective Data Entry (RDE)** by specifying the Visit start and end dates

NB:

Other than Visit start date for Ongoing and Visit Start Date and End Date for In the Past; all the other fields are the same for all the options

- Fill the fields appropriately then click ‘Start visit’ to load the patient home page, otherwise click on ‘Discard’ to cancel the operation.

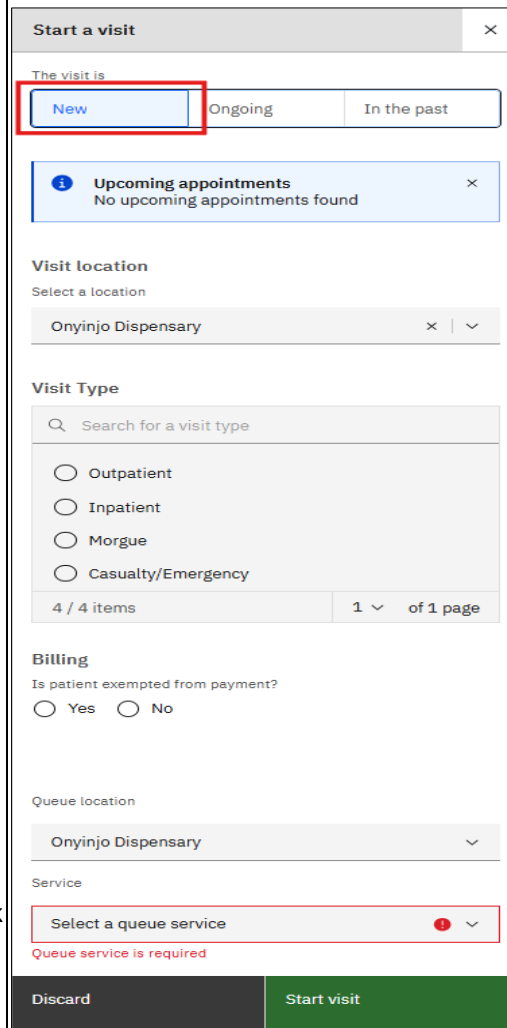


1 Actions

2 Check in

Edit patient details

Mark patient deceased



Start a visit

The visit is

☒ New ☐ Ongoing ☐ In the past

Upcoming appointments
No upcoming appointments found

Visit location
Select a location
Onyinjo Dispensary

Visit Type
Search for a visit type

☐ Outpatient
☐ Inpatient
☐ Morgue
☐ Casualty/Emergency

4 / 4 items 1 of 1 page

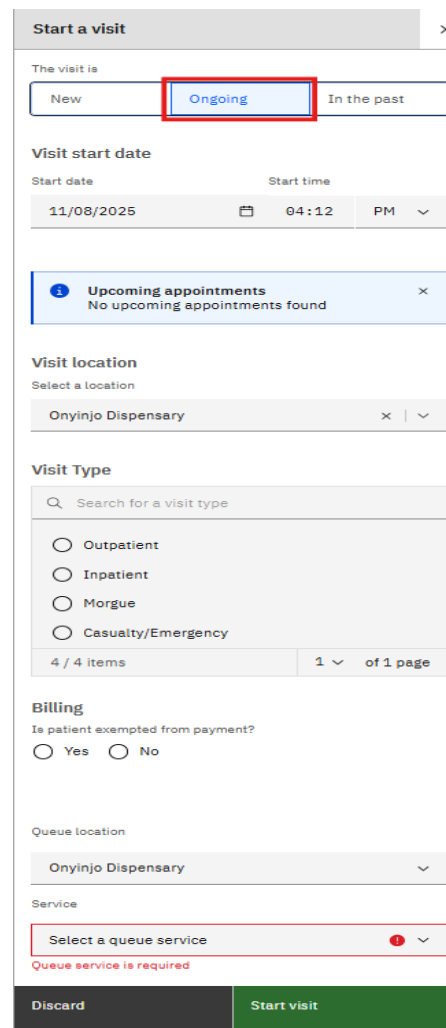
Billing
Is patient exempted from payment?
☐ Yes ☐ No

Queue location
Onyinjo Dispensary

Service
Select a queue service

Queue service is required

Discard Start visit



Start a visit

The visit is

☐ New ☒ Ongoing ☐ In the past

Visit start date
Start date Start time
11/08/2025 04:12 PM

Upcoming appointments
No upcoming appointments found

Visit location
Select a location
Onyinjo Dispensary

Visit Type
Search for a visit type

☐ Outpatient
☐ Inpatient
☐ Morgue
☐ Casualty/Emergency

4 / 4 items 1 of 1 page

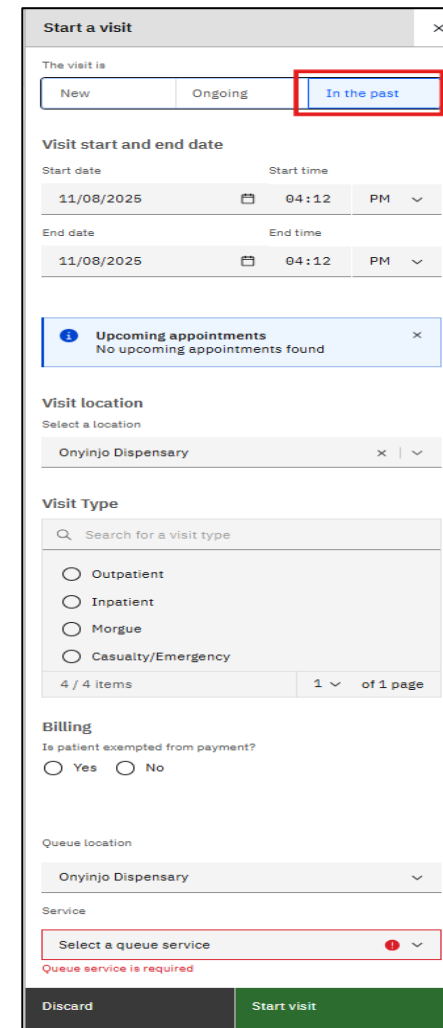
Billing
Is patient exempted from payment?
☐ Yes ☐ No

Queue location
Onyinjo Dispensary

Service
Select a queue service

Queue service is required

Discard Start visit



Start a visit

The visit is

☐ New ☐ Ongoing ☒ In the past

Visit start and end date
Start date Start time End date End time
11/08/2025 04:12 PM 11/08/2025 04:12 PM

Upcoming appointments
No upcoming appointments found

Visit location
Select a location
Onyinjo Dispensary

Visit Type
Search for a visit type

☐ Outpatient
☐ Inpatient
☐ Morgue
☐ Casualty/Emergency

4 / 4 items 1 of 1 page

Billing
Is patient exempted from payment?
☐ Yes ☐ No

Queue location
Onyinjo Dispensary

Service
Select a queue service

Queue service is required

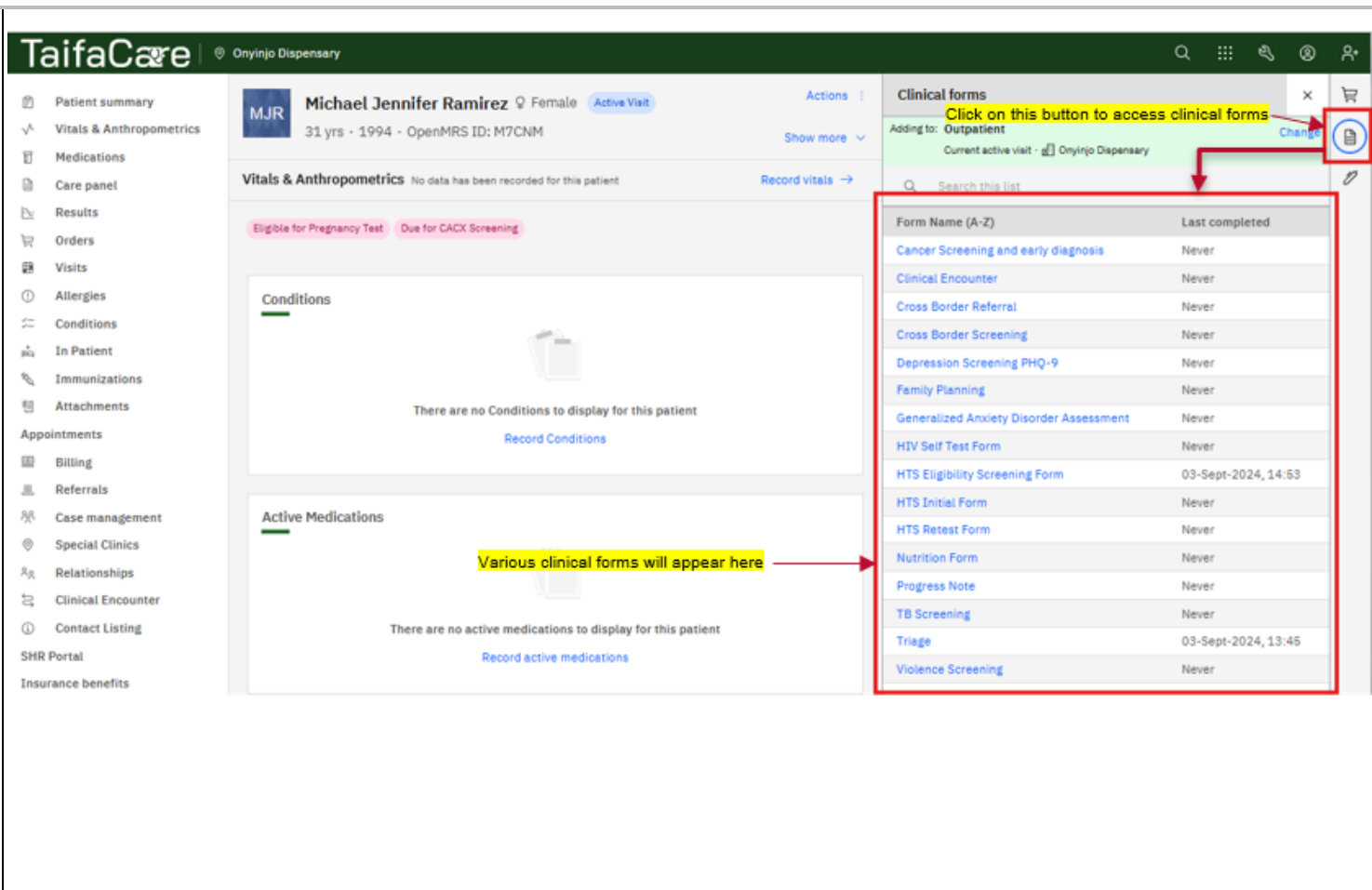
Discard Start visit

Step 5

Open Encounter Forms

- Once the client has checked in, navigate to the **'Forms'** icon located on the right-hand side of the navigation panel. This icon will enable you to access the various available forms (as highlighted). Simply click on the desired form to open it.

NB: Some forms may be missing from the list because the patient is not enrolled in the relevant programs. For instance, MCH forms may be missing if the client is not enrolled in MCH service.



The screenshot displays the TaifaCare interface for a patient named Michael Jennifer Ramirez. The interface includes a navigation panel on the left, a patient summary section at the top, and a main content area with sections for Vitals & Anthropometrics, Conditions, and Active Medications. A red box highlights the 'Clinical forms' panel on the right, which contains a list of forms and their completion status. A yellow box highlights the 'Forms' icon in the navigation panel, and a red arrow points from it to the 'Clinical forms' panel. Another yellow box highlights the 'Various clinical forms will appear here' text in the Active Medications section, with a red arrow pointing to the 'Clinical forms' panel.

Clinical forms

Adding to: Outpatient
Current active visit: Onyinja Dispensary

Search this list

Form Name (A-Z)	Last completed
Cancer Screening and early diagnosis	Never
Clinical Encounter	Never
Cross Border Referral	Never
Cross Border Screening	Never
Depression Screening PHQ-9	Never
Family Planning	Never
Generalized Anxiety Disorder Assessment	Never
HIV Self Test Form	Never
HTS Eligibility Screening Form	03-Sept-2024, 14:53
HTS Initial Form	Never
HTS Retest Form	Never
Nutrition Form	Never
Progress Note	Never
TB Screening	Never
Triage	03-Sept-2024, 13:45
Violence Screening	Never

THE END