

SOP: Taifa Care Billing Workflow Guide

(Last update: August 2025)

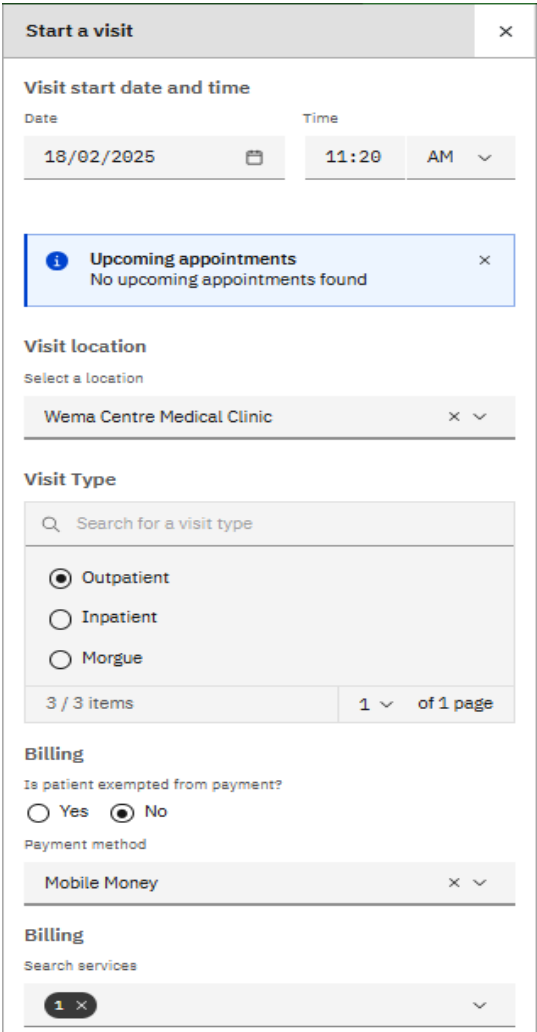
TASK:	To guide users on how to navigate Billing module in Taifa Care
OBJECTIVE:	Effectively manage billing within a facility. Captures billing information from registration to client exit
WHO:	Finance Department, Clinician, Nurses, Labtech and Pharm techs
REQUIRED MATERIALS:	Functional TaifaCare Version 19.2.0 and above
SUMMARY: The billing module in the Taifa Care system streamlines the billing process by integrating it with patient records and clinical workflows. It allows healthcare providers to generate accurate invoices, submit claims to payers, and track payments efficiently. The module ensures compliance with billing regulations and facilitates revenue cycle management.	

The following are key billing tasks supported in the Module:

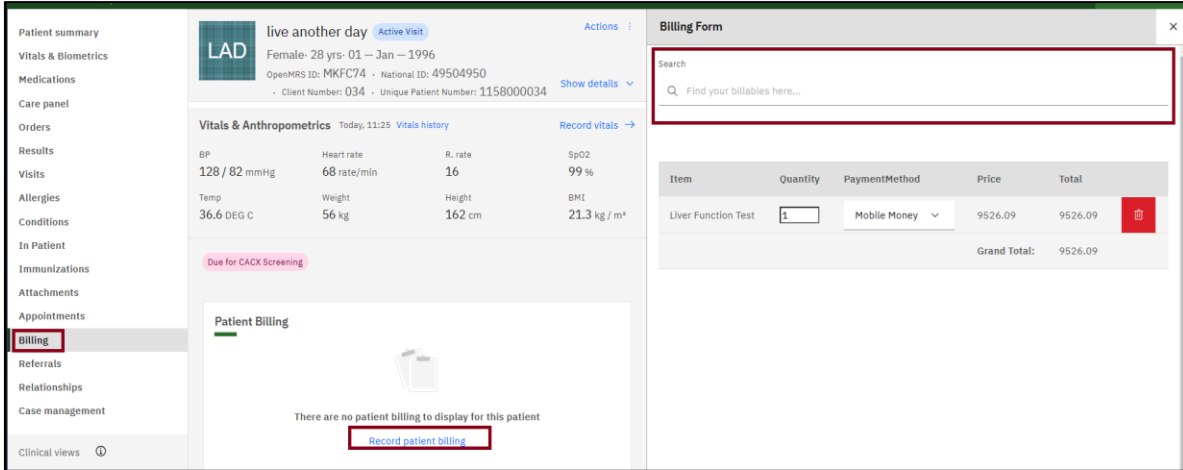
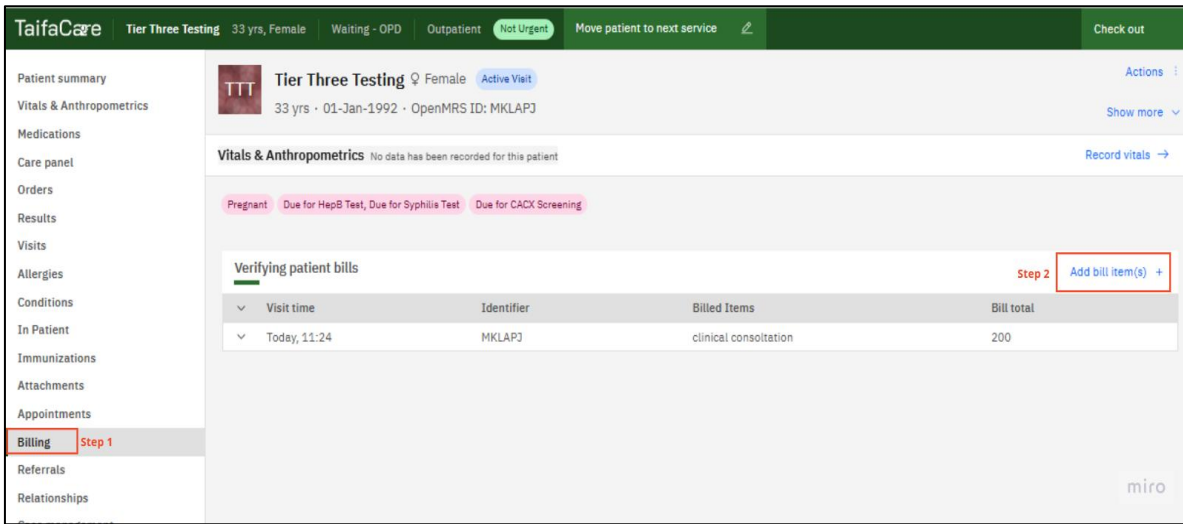
- 1) Registration Desk Tasks
- 2) Consultation Desk Tasks
- 3) Inpatient Department Tasks
- 4) Revenue/Cash Department Tasks
- 5) Printing of Bills/Receipts

The workflow described in this user guide assumes that all bills are generated from the respective service points and that all payments are made at the hospital's central Finance Unit for cash and non-cash payments.

PART 1: Registration Desk

No	Task Description	Screenshot
1	Key Tasks i. New Patient Refer to Patient Registration SOP available on our website Existing Patient • Search for the patient • Click check in for the visit. • Specify visit type • Specify Payment Details • Specify Payment methods (Cash, Mobile, Insurance) • Select billable service. ii. Queue patient for visit Specify Priority, status and service.	

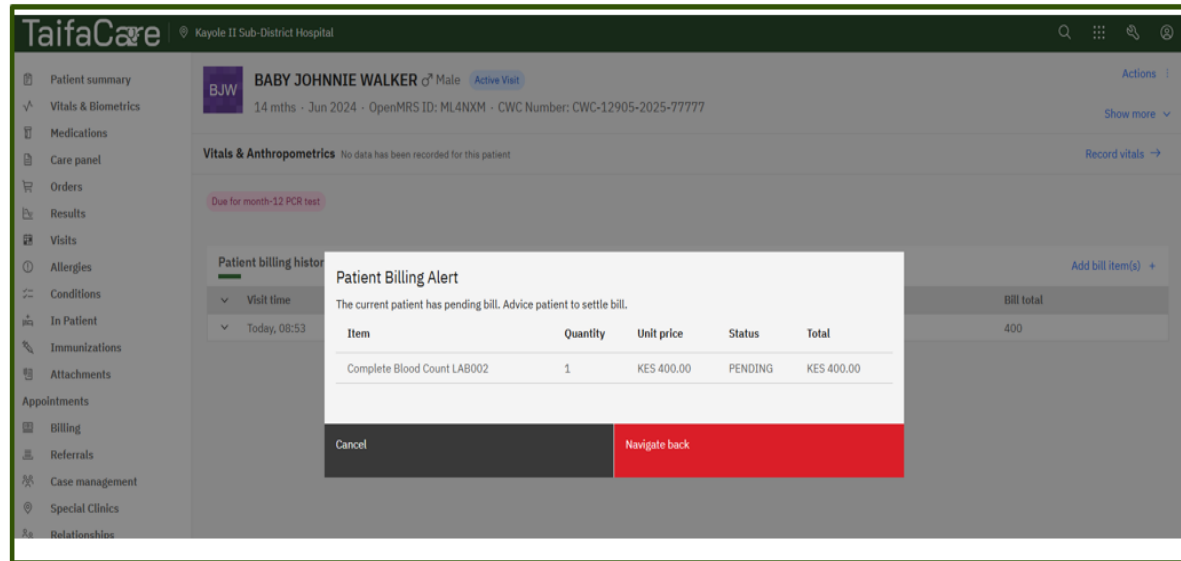
PART 2: Consultation Desk

No	Task Description	Screenshot
	iii. Create Multiple Services/Drugs Orders (Ad hoc Billing) While the patient is receiving clinical consultation, the clinician can create/order multiple other services and drugs for it to be billed to the patient. Here is how to perform this: Steps 1: Click on “Billing” (Billing tab will become visible within the patient chart) If NO bill exists. Steps 2: If NO bill exists; click “Record Patient billing”, If a bill exists; click “Add bill item(s)” – This will open a form to the right of your screen as illustrated to your right. Steps 3: Search for the Item – This will open a form to the left of your screen as illustrated to your right. Steps 4: Select the billable items	 

Steps 5: Save and close the items added and they should be visible in the patient Billing panel.

NB:

- A patient billing alert will pop up if service provider tries to give services to a patient without settling the bill

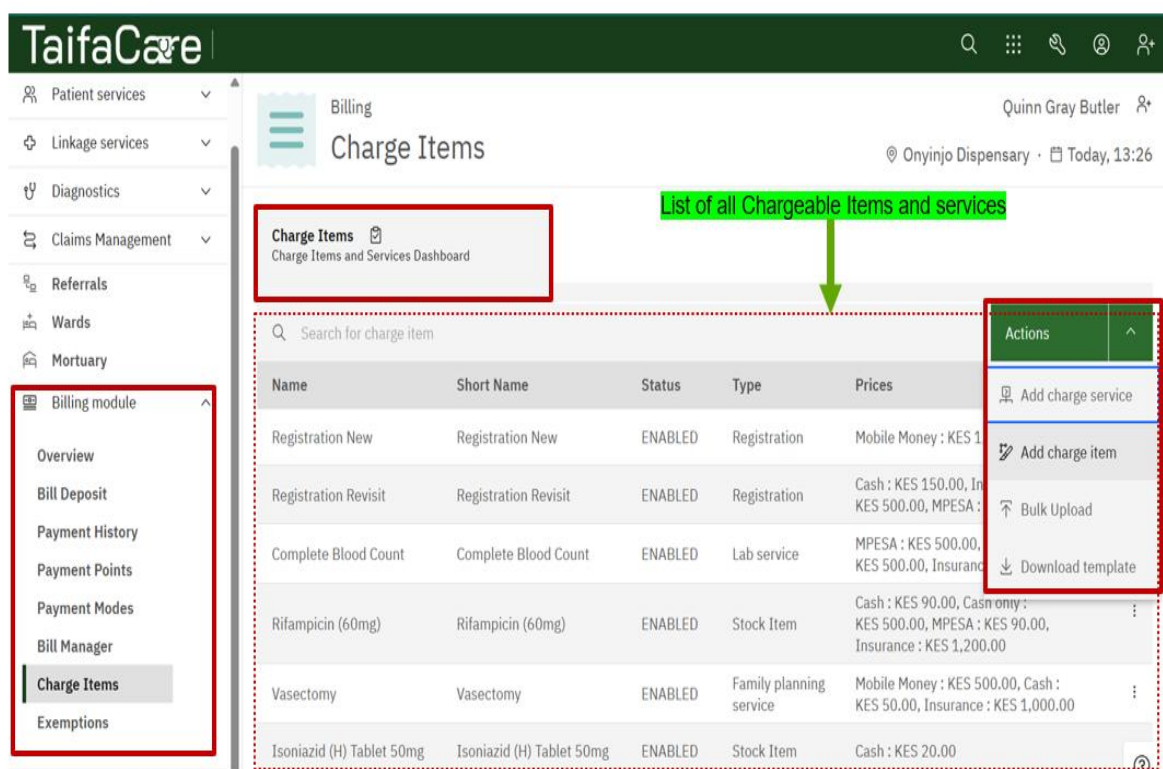


The screenshot shows the TaifaCare interface for Kayole II Sub-District Hospital. The patient is BABY JOHNNIE WALKER, Male, 14 months old, with an OpenMRS ID of ML4NXM and a CWC Number of CWC-12905-2025-77777. The interface displays various patient data sections like Vitals & Biometrics, Medications, and Orders. A modal titled "Patient Billing Alert" is displayed, indicating that the current patient has a pending bill. The modal contains a table with the following data:

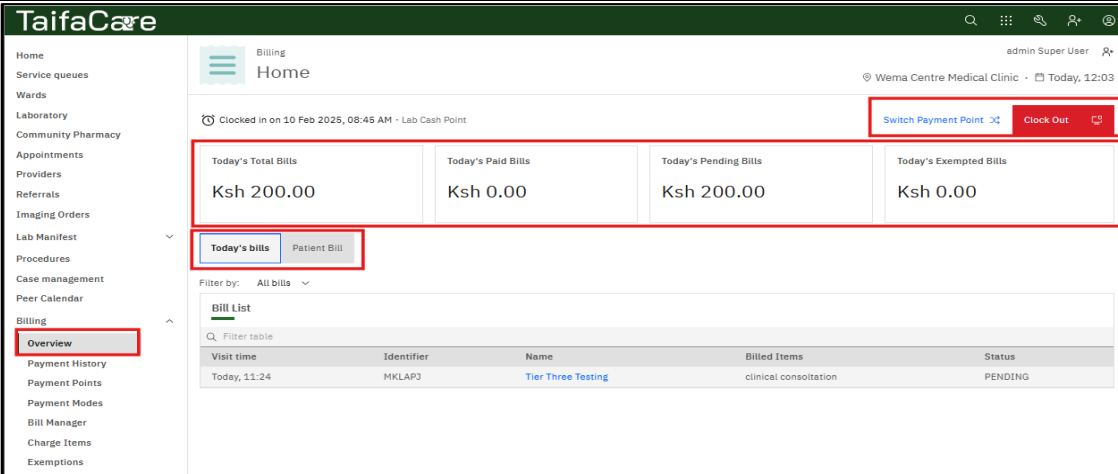
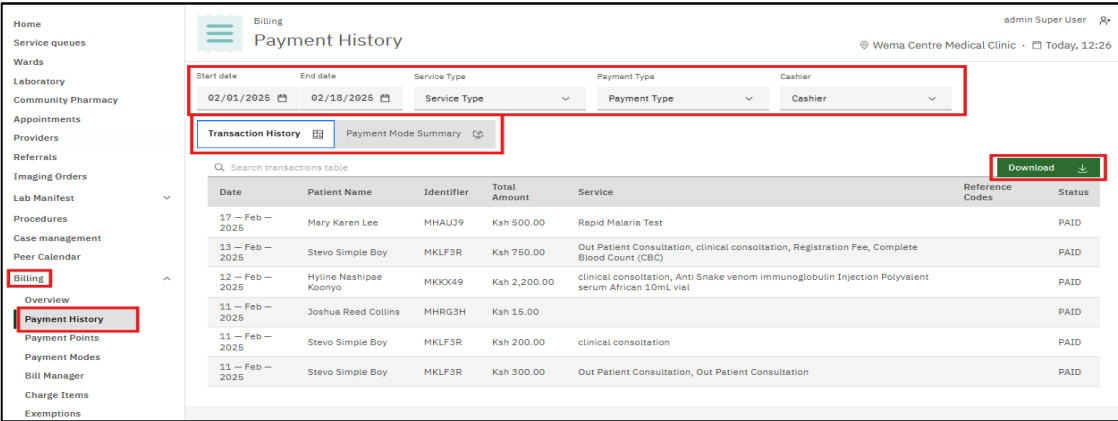
Item	Quantity	Unit price	Status	Total
Complete Blood Count LAB002	1	KES 400.00	PENDING	KES 400.00

The modal also shows a "Bill total" of 400. At the bottom of the modal, there are two buttons: "Cancel" and "Navigate back".

PART 3: Inpatient Department

No	Task Description	Screenshot																																			
1	Key Billable Tasks i. Search patient. - Search patient from the system or locate patient from the Inpatient Queue ii. Update daily Billable Services - Billable services to be updated in the system include all consumables, commodities and prescriptions used on the patient during the entire stay in the ward. They may include: - Pharmaceuticals and non-pharmaceuticals - Drugs - Bed charges. - Procedures - Doctors' Fee etc	 TaifaCare Billing Charge Items Quinn Gray Butler Onyinjo Dispensary · Today, 13:26 Charge Items Charge Items and Services Dashboard List of all Chargeable Items and services <table><tr><th>Name</th><th>Short Name</th><th>Status</th><th>Type</th><th>Prices</th></tr><tr><td>Registration New</td><td>Registration New</td><td>ENABLED</td><td>Registration</td><td>Mobile Money : KES 1</td></tr><tr><td>Registration Revisit</td><td>Registration Revisit</td><td>ENABLED</td><td>Registration</td><td>Cash : KES 150.00, In KES 500.00, MPESA :</td></tr><tr><td>Complete Blood Count</td><td>Complete Blood Count</td><td>ENABLED</td><td>Lab service</td><td>MPESA : KES 500.00, KES 500.00, Insurance</td></tr><tr><td>Rifampicin (60mg)</td><td>Rifampicin (60mg)</td><td>ENABLED</td><td>Stock Item</td><td>Cash : KES 90.00, Cash ony KES 500.00, MPESA : KES 90.00, Insurance : KES 1,200.00</td></tr><tr><td>Vasectomy</td><td>Vasectomy</td><td>ENABLED</td><td>Family planning service</td><td>Mobile Money : KES 500.00, Cash : KES 50.00, Insurance : KES 1,000.00</td></tr><tr><td>Isoniazid (H) Tablet 50mg</td><td>Isoniazid (H) Tablet 50mg</td><td>ENABLED</td><td>Stock Item</td><td>Cash : KES 20.00</td></tr></table> Actions - Add charge service - Add charge item - Bulk Upload - Download template	Name	Short Name	Status	Type	Prices	Registration New	Registration New	ENABLED	Registration	Mobile Money : KES 1	Registration Revisit	Registration Revisit	ENABLED	Registration	Cash : KES 150.00, In KES 500.00, MPESA :	Complete Blood Count	Complete Blood Count	ENABLED	Lab service	MPESA : KES 500.00, KES 500.00, Insurance	Rifampicin (60mg)	Rifampicin (60mg)	ENABLED	Stock Item	Cash : KES 90.00, Cash ony KES 500.00, MPESA : KES 90.00, Insurance : KES 1,200.00	Vasectomy	Vasectomy	ENABLED	Family planning service	Mobile Money : KES 500.00, Cash : KES 50.00, Insurance : KES 1,000.00	Isoniazid (H) Tablet 50mg	Isoniazid (H) Tablet 50mg	ENABLED	Stock Item	Cash : KES 20.00
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Isoniazid (H) Tablet 50mg	Isoniazid (H) Tablet 50mg	ENABLED	Stock Item	Cash : KES 20.00																																	

PART 4: Revenue Department/ Cash Office

No	Task Description	Screenshot
1	Overview - User will be able to switch to appropriate Payment Point and Clock out of the billing module - Will show the billing dashboard, Today's total Bills, Today's Paid Bills, Today's Pending Bills and Today's Exempted Bills Today's Bills Tab will give a list of all bills for the day Patient Bill tab will enable users to search for a specific patient to see and process his/her bills Payment History - User can filter Bills by date ranges, service type, payment type and specific cashier Payment History can be viewed by Transaction History which will also indicate status of the bills and by Payment Mode Summary Note: User can download an excel list of Transaction History after filtering	 The screenshot shows the 'TaifaCare' Billing Home dashboard. The left sidebar contains a menu with items like Home, Service queues, Wards, Laboratory, Community Pharmacy, Appointments, Providers, Referrals, Imaging Orders, Lab Manifest, Procedures, Case management, Peer Calendar, Billing, Overview, Payment History, Payment Modes, Bill Manager, Charge Items, and Exemptions. The 'Billing' section is active, showing a 'Home' view. At the top right, there are buttons for 'Switch Payment Point' and 'Clock Out'. Below this, a summary section displays four boxes: 'Today's Total Bills' (Ksh 200.00), 'Today's Paid Bills' (Ksh 0.00), 'Today's Pending Bills' (Ksh 200.00), and 'Today's Exempted Bills' (Ksh 0.00). Below the summary, there are tabs for 'Today's bills' and 'Patient Bill'. The 'Today's bills' tab is selected, showing a 'Bill List' table with columns: Visit time, Identifier, Name, Billed Items, and Status. The table contains one entry: 'Today, 11:24', 'MKLAPJ', 'Tier Three Testing', 'clinical consultation', and 'PENDING'.  The screenshot shows the 'TaifaCare' Billing Payment History page. The left sidebar is the same as the previous screenshot. The 'Billing' section is active, showing a 'Payment History' view. At the top right, there are buttons for 'Transaction History' and 'Payment Mode Summary'. Below this, there are filters for 'Start date', 'End date', 'Service Type', 'Payment Type', and 'Cashier'. The 'Transaction History' tab is selected, showing a 'Search transactions table' with a 'Download' button. The table has columns: Date, Patient Name, Identifier, Total Amount, Service, Reference Codes, and Status. The table contains several entries, including '17 - Feb - 2025' for 'Mary Karen Lee' (Rapid Malaria Test, PAID), '13 - Feb - 2025' for 'Stevio Simple Boy' (Out Patient Consultation, clinical consultation, Registration Fee, Complete Blood Count (CBC), PAID), '12 - Feb - 2025' for 'Hyline Nashipae Koonyo' (clinical consultation, Anti Snake venom immunoglobulin Injection Polyvalent serum African 10mL vial, PAID), '11 - Feb - 2025' for 'Joshua Reed Collins' (Ksh 15.00, PAID), '11 - Feb - 2025' for 'Stevio Simple Boy' (Ksh 200.00, clinical consultation, PAID), and '11 - Feb - 2025' for 'Stevio Simple Boy' (Ksh 300.00, Out Patient Consultation, Out Patient Consultation, PAID).

Billing Configurations

Payment Points

- User will be able to Create additional Payment Points
- Existing payment points can be viewed and edited
- **To create a payment point;** click **'Create Payment Point'** then enter the name and description. Click **'Create'** to create the payment point

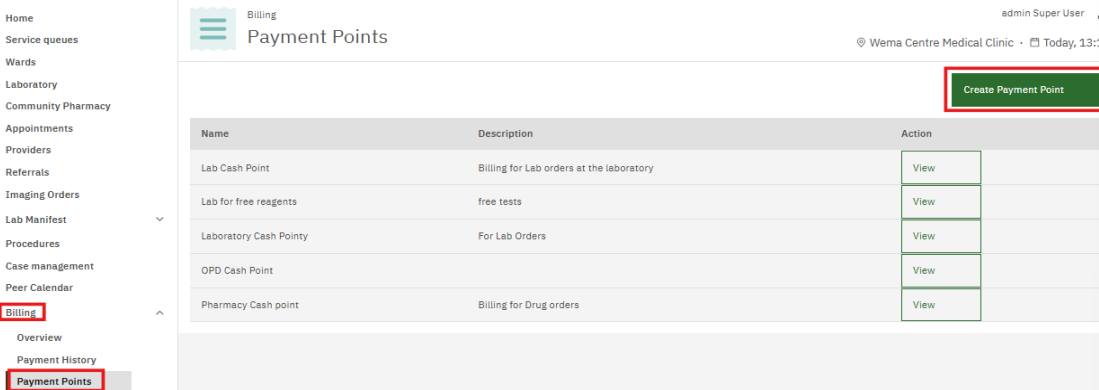
Payment Modes

- User will be able to Create additional Payment Points
- **To add a Payment mode,** click **'Add Payment Mode'** then a form will be loaded. Enter the name and description, you can also enable the payment mode and as well add attributes if necessary
- Finally click **'Save & Close'** to create

Bill Manger

- A user will be able to search for specific patients with bills; the user can edit, waive or delete the bill

TaifaCare



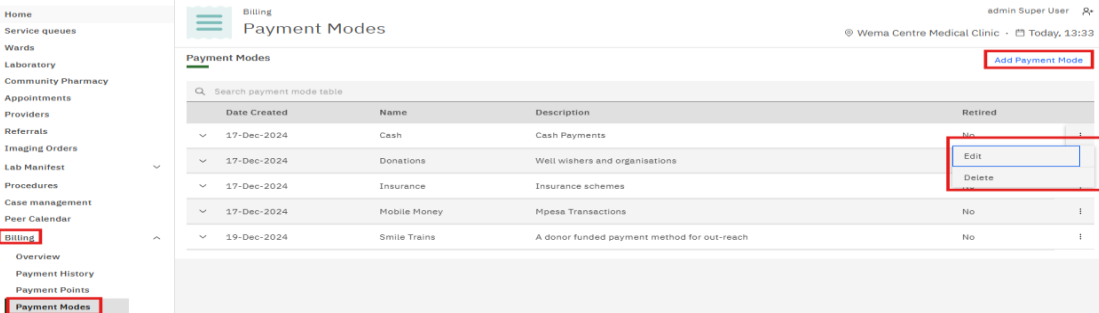
admin Super User | Wema Centre Medical Clinic | Today, 13:10

Create Payment Point

Name	Description	Action
Lab Cash Point	Billing for Lab orders at the laboratory	View
Lab for free reagents	free tests	View
Laboratory Cash Pointy	For Lab Orders	View
OPD Cash Point		View
Pharmacy Cash point	Billing for Drug orders	View

Navigation: Home, Service queues, Wards, Laboratory, Community Pharmacy, Appointments, Providers, Referrals, Imaging Orders, Lab Manifest, Procedures, Case management, Peer Calendar, **Billing**, Overview, Payment History, **Payment Points**

TaifaCare



admin Super User | Wema Centre Medical Clinic | Today, 13:33

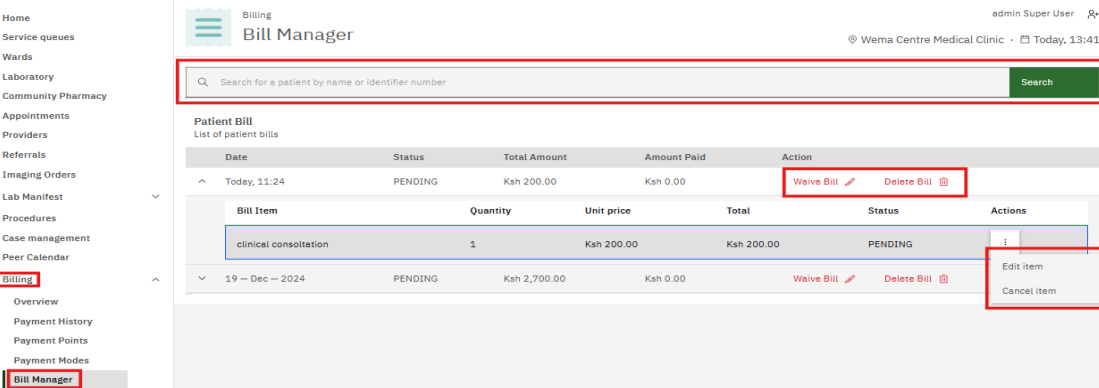
Add Payment Mode

Search payment mode table

Date Created	Name	Description	Retired
17-Dec-2024	Cash	Cash Payments	No
17-Dec-2024	Donations	Well wishers and organisations	Edit Delete
17-Dec-2024	Insurance	Insurance schemes	
17-Dec-2024	Mobile Money	Mpesa Transactions	No
19-Dec-2024	Smile Trains	A donor funded payment method for out-reach	No

Navigation: Home, Service queues, Wards, Laboratory, Community Pharmacy, Appointments, Providers, Referrals, Imaging Orders, Lab Manifest, Procedures, Case management, Peer Calendar, **Billing**, Overview, Payment History, **Payment Modes**

TaifaCare



admin Super User | Wema Centre Medical Clinic | Today, 13:41

Search for a patient by name or identifier number **Search**

Patient Bill
List of patient bills

Date	Status	Total Amount	Amount Paid	Action
Today, 11:24	PENDING	Ksh 200.00	Ksh 0.00	Waive Bill Delete Bill

Bill Item	Quantity	Unit price	Total	Status	Actions
clinical consultation	1	Ksh 200.00	Ksh 200.00	PENDING	Edit item Cancel item
19 - Dec - 2024	PENDING	Ksh 2,700.00	Ksh 0.00	Waive Bill Delete Bill	

Navigation: Home, Service queues, Wards, Laboratory, Community Pharmacy, Appointments, Providers, Referrals, Imaging Orders, Lab Manifest, Procedures, Case management, Peer Calendar, **Billing**, Overview, Payment History, Payment Points, **Payment Modes**, **Bill Manager**

Charge Items

- A user will be able to search for and edit an existing charge item, both services and items.

Actions:

- Add Charge Service:** enables a user to add/create a charge service and its cost per payment method
- Add Charge Item:** enables a user to add a commodity, its unit cost per payment method
- Bulk Upload:** This feature is used for importing billable items from a spreadsheet
- Download template:** This downloads a template used for bulk uploads. Download, update then use step above to upload the items updated.

Exemptions

- This will enable a user to configure exemptions
- **Edit Schema** used to update the items/services exempted
- **Schema Preview** is used to view the items configured for exemptions

TaifaCare

admin Super User
Wema Centre Medical Clinic · Today, 14:22

Charge Items
Charge Items and Services Dashboard

Search for charge item

Name	Short Name	Status	Type	Prices	Actions
clinical consultation	c/c	ENABLED	Clinical consultation	Cash : Ksh 200.00, Insurance : Ksh 500.00	⋮
PPE 1 Protective overall google nitrile gloves face mask N95 shoe cover	PPE 1 Protective overall google nitrile gloves face mask N95 shoe cover	ENABLED	Stock Item	Mobile Money : Ksh 3,000.00	Edit charge item
Ova and Cyst	Ova and Cyst	ENABLED	Lab service	Insurance : Ksh 200.00, Cash : Ksh 200.00	⋮
Metronidazole Tablet 400mg	Metronidazole Tablet 400mg	ENABLED	Stock Item	Cash : Ksh 20.00, Insurance : Ksh 20.00, Mobile Money : Ksh 20.00, Donations : Ksh 20.00	⋮
Paracetamol Tablet 500mg	Paracetamol Tablet 500mg	ENABLED	Stock Item	Mobile Money : Ksh 3.00	⋮
Anti Snake venom immunoglobulin Injection Polyvalent serum African 10mL vial	Anti Snake venom immunoglobulin Injection Polyvalent serum African 10mL vial	ENABLED	Stock Item	Cash : Ksh 2,000.00	⋮
Rapid Malaria Test	Rapid Malaria Test	ENABLED	Lab service	Cash : Ksh 500.00, Insurance : Ksh 1,200.00, Mobile Money : Ksh 500.00	⋮
Leg X-ray	Leg X-ray	ENABLED	Radiology department	Insurance : Ksh 2,500.00, Cash : Ksh 2,500.00, Mobile Money : Ksh 2,500.00	⋮

Actions

- Add charge service
- Add charge item
- Bulk Upload
- Download template

admin Super User
Wema Centre Medical Clinic · Today, 14:47

Exemptions Schema Editor

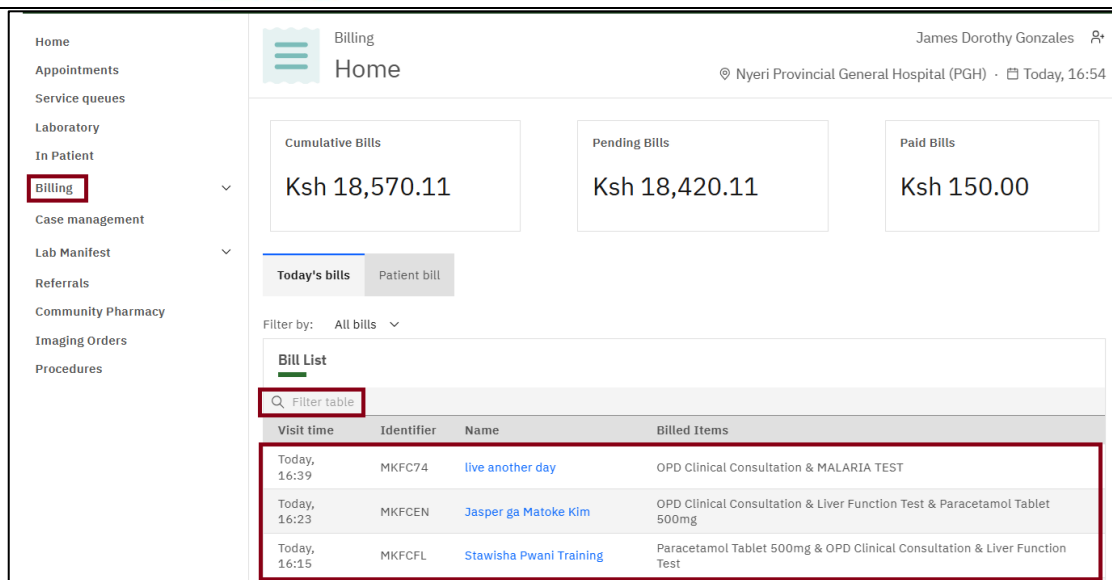
Schema Preview Edit Schema

- services
 - all
 - HIV Viral Load (856000001122243)
 - PCR (167441)
 - GeneXpert (162202)
 - program: HIV
 - Registration (1000061)
 - program: TB
 - GeneXpert (162202)
 - age < 5
 - Malaria Smear (32)
 - visitAttribute: prisoner
 - Malaria Smear (32)
- commodities

Billing Processing

i. Locate patient

- Click **Home** (1)
- Locate and click Billing (2)
- Search for patient by typing patient name or Identifier. (3)
- Locate the patient and click on the name (4)



Home Appointments Service queues Laboratory In Patient **Billing** Case management Lab Manifest Referrals Community Pharmacy Imaging Orders Procedures

Billing Home James Dorothy Gonzales Nyeri Provincial General Hospital (PGH) Today, 16:54

Cumulative Bills Ksh 18,570.11 Pending Bills Ksh 18,420.11 Paid Bills Ksh 150.00

Today's bills Patient bill

Filter by: All bills

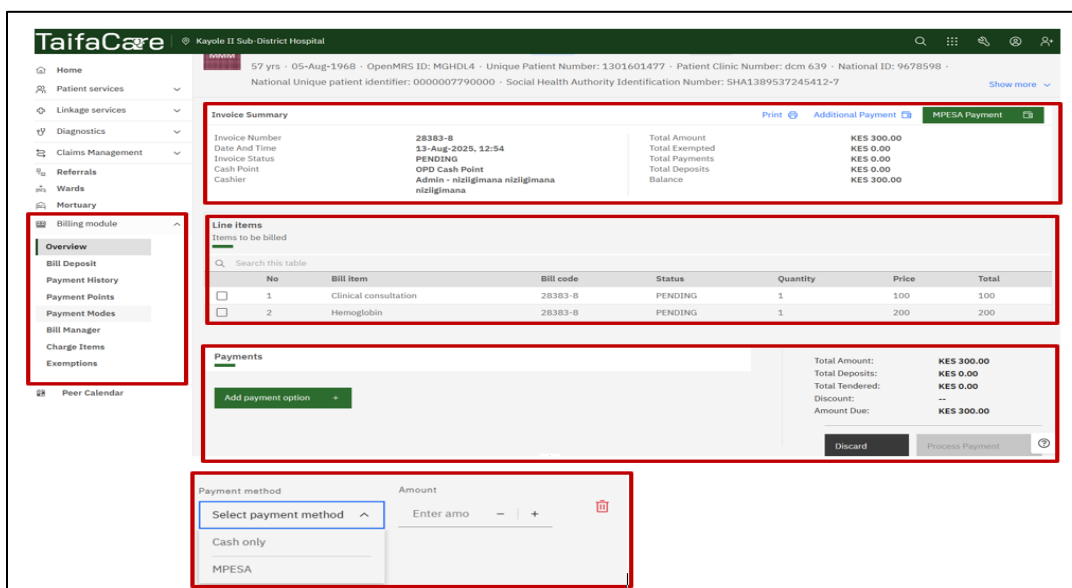
Bill List

Filter table

Visit time	Identifier	Name	Billed Items
Today, 16:39	MKFC74	live another day	OPD Clinical Consultation & MALARIA TEST
Today, 16:23	MKFCEN	Jasper ga Matoke Kim	OPD Clinical Consultation & Liver Function Test & Paracetamol Tablet 500mg
Today, 16:15	MKFCFL	Stawisha Pwani Training	Paracetamol Tablet 500mg & OPD Clinical Consultation & Liver Function Test

ii. Process Payment

- On the patient billing profile (shown), you can print the invoice.
- Various payment methods are available to patient i.e. Cash, Mobile, Insurance
- Once payment is completed, a receipt is printed.



TaifaCare Kayote II Sub-District Hospital

57 yrs · 05-Aug-1968 · OpenMRS ID: MGHDL4 · Unique Patient Number: 1301601477 · Patient Clinic Number: dcm 639 · National ID: 9678598 · National Unique patient identifier: 0000007790000 · Social Health Authority Identification Number: SHA1389537245412-7

Home Patient services Linkage services Diagnostics Claims Management Referrals Wards Mortuary **Billing module** Peer Calendar

Overview Bill Deposit Payment History Payment Points Payment Modes Bill Manager Charge Items Exemptions

Invoice Summary

Invoice Number	Date And Time	Invoice Status	Cash Point	Cashier	Total Amount	Total Exempted	Total Payments	Total Deposits	Balance
28383-8	13-Aug-2025, 12:54	PENDING	OPD Cash Point	Admin - nizigimana nizigimana	KES 300.00	KES 0.00	KES 0.00	KES 0.00	KES 300.00

Line Items

No	Bill Item	Bill code	Status	Quantity	Price	Total
1	Clinical consultation	28383-8	PENDING	1	100	100
2	Hemoglobin	28383-8	PENDING	1	200	200

Payments

Total Amount: KES 300.00
Total Deposits: KES 0.00
Total Tendered: KES 0.00
Discount: --
Amount Due: KES 300.00

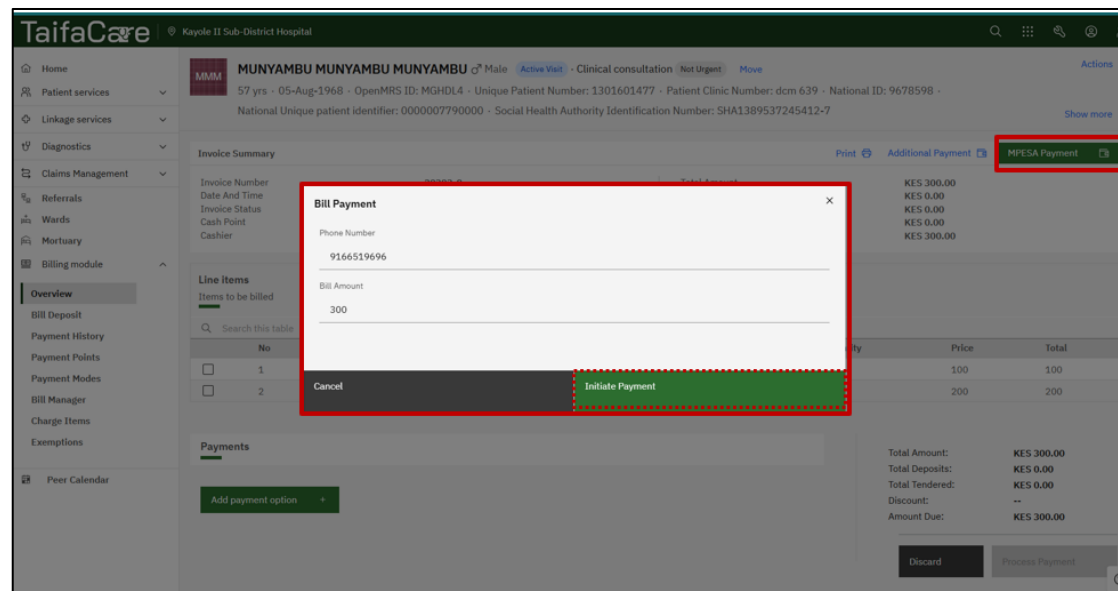
Payment method: Select payment method (Cash only, MPESA) Amount: Enter amo

iii. Process Payments via Mobile Money (STK Push)

- **Step 1:** On the patient billing profile (shown), you can **initiate payment**.
- A pop window will show requesting for the user to enter the phone number making the payment in the following format 2547XXXXXXX or 25411XXXXXXX
- **Step 2:** Once you have entered the phone number correctly, enter the amount and click on **initiate payment**.

STK PUSH Notification

- The phone number making the payment will receive an MPESA pin prompt with the amount to be debited from their MPESA account.



TaifaCare - Kayole II Sub-District Hospital

MUNYAMBU MUNYAMBU Male - Active Visit - Clinical consultation - Not Urgent - Move

57 yrs - 05-Aug-1968 - OpenMRS ID: MGHDL4 - Unique Patient Number: 1301601477 - Patient Clinic Number: dcm 639 - National ID: 9678598 -
National Unique patient identifier: 0000007790000 - Social Health Authority Identification Number: SHA1389537245412-7

Invoice Summary

Invoice Number: [blank]
Date And Time: [blank]
Invoice Status: [blank]
Cash Point: [blank]
Cashier: [blank]

Line Items

Items to be billed:

No	Qty	Price	Total
1	100	100	100
2	200	200	200

Payments

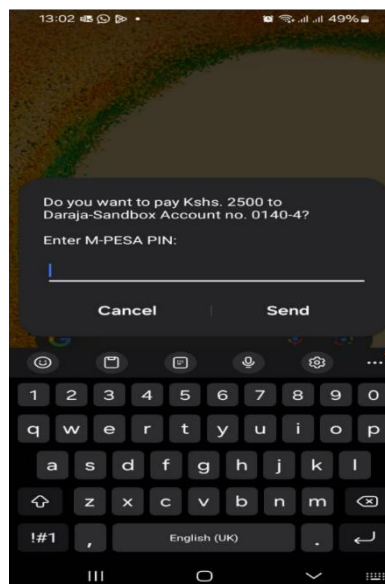
Total Amount: KES 300.00
Total Deposits: KES 0.00
Total Tendered: KES 0.00
Discount: --
Amount Due: KES 300.00

Bill Payment

Phone Number: 9166519696

Bill Amount: 300

Initiate Payment



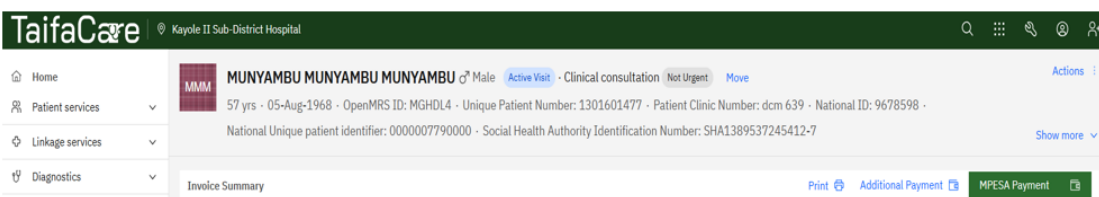
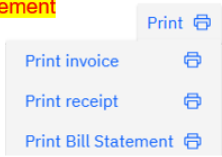
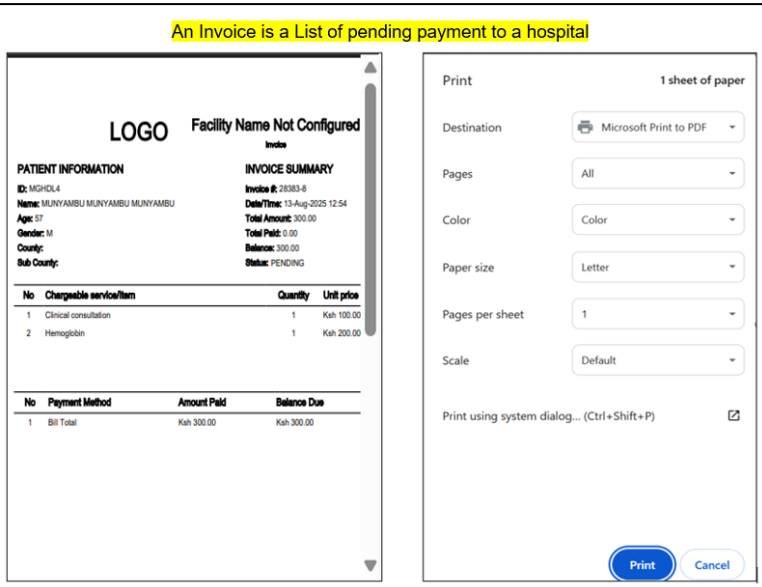
13:02 49%

Do you want to pay Kshs. 2500 to Daraja-Sandbox Account no. 0140-4?

Enter M-PESA PIN:

Cancel **Send**

PART 5: Printing Bills and Receipts

No	Task Description	Screenshot
	Printing Options for a Bill Print Invoice - Click on 'Print Bill' button – the system will open a new interface/form as shown in the next page. - Select and confirm the printer you would like to send the printout to. - Click on print and get your printed copy of the bill. - NB: The bill printed will come as an invoice showing bills that are pending those already settled.	 A user can choose which item to print, either an Invoice, a Receipt or a Bill statement  Printing an Invoice An Invoice is a List of pending payment to a hospital 

Print Receipt:

- Click on '**Print Receipt**' button – the system will open a new interface as shown in the next page with the receipt details.
- The receipt will have information on the Health Facility name, Patient name, Items on the receipt, amount and payment method used.

Note: The Print receipt button will be activated immediately after processing payment and all bill cleared

Printing a Receipt

A Receipt is Evidence of Payment made to a hospital for services or Items rendered

 KenyaEMR
Ndindika Health Centre

Date: 13-Aug-2025 12:54:38
 Receipt No: 28383-8
 Patient: Munyambu Munyambu Munyambu (57 Years)
 Patient ID: MGHDL4

Qty	Item	Price	Total
Total			300.00

Payment	Ref No
Balance Due 300.00	

You were served by NIIIIIGIMANA NIIIIIGIMANA NIIIIIGIMANA
 GET WELL SOON

Print
 1 sheet of paper

Destination: Microsoft Print to PDF

Pages: All

Color: Color

Paper size: Letter

Pages per sheet: 1

Scale: Default

Print using system dialog... (Ctrl+Shift+P) ☒

Print Cancel

Printing a Bill Statement

Print Bill Statement:

- Click on 'Bill Statement' button – the system will open a new interface as shown in the next page with the receipt details.
- The receipt will have information on the Health Facility name, Patient name, Items on the receipt, amount and payment method used.

Note: The Print Bill Statement button will be activated immediately after processing payment and all bill cleared

A Bill Statement is a compilation of accrued Bill status at a specific time.


Facility Name Not Configured
Breakdown of Your Medical Care Costs

PATIENT INFORMATION
 ID: MOHDL4
 Name: MUNYAMBU MUNYAMBU MUNYAMBU
 Age: 57
 Gender: M
 Bill #: 28383-8
 Date: 13-Aug-2025 12:54:38

BILL SUMMARY
 Status: PAID
 Total Bill: Ksh 300.00
 Total Paid: Ksh 300.00
 Balance: Ksh 0.00
 Cash Paid: IPD Cash Point
 Cashier: NZIGIMANA NZIGIMANA NZIGIMANA

Detailed list of services/items provided

No	Service/Item Description	Qty	Unit Price	Total	Date Added
1	Clinical consultation	1	Ksh 100.00	Ksh 100.00	13-Aug-2025 12:54
2	Hemoglobin	1	Ksh 200.00	Ksh 200.00	13-Aug-2025 12:54

Payment History

No	Date	Method	Tendered	Applied	Cashier	Reference
1	13-Aug-2025 15:55:10	Insurance	Ksh 300.00	Ksh 300.00	NZIGIMANA NZIGIMANA NZIGIMANA (admin)	NA

Bill Summary

Total Bill Amount:	Ksh 300.00
Total Payments:	Ksh 300.00
Balance Due:	Ksh 0.00

Print

1 sheet of paper

Destination:  Microsoft Print to PDF

Pages: All

Color: Color

Paper size: Letter

Pages per sheet: 1

Scale: Default

Print using system dialog... (Ctrl+Shift+P)

Print

Cancel

THE END