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:

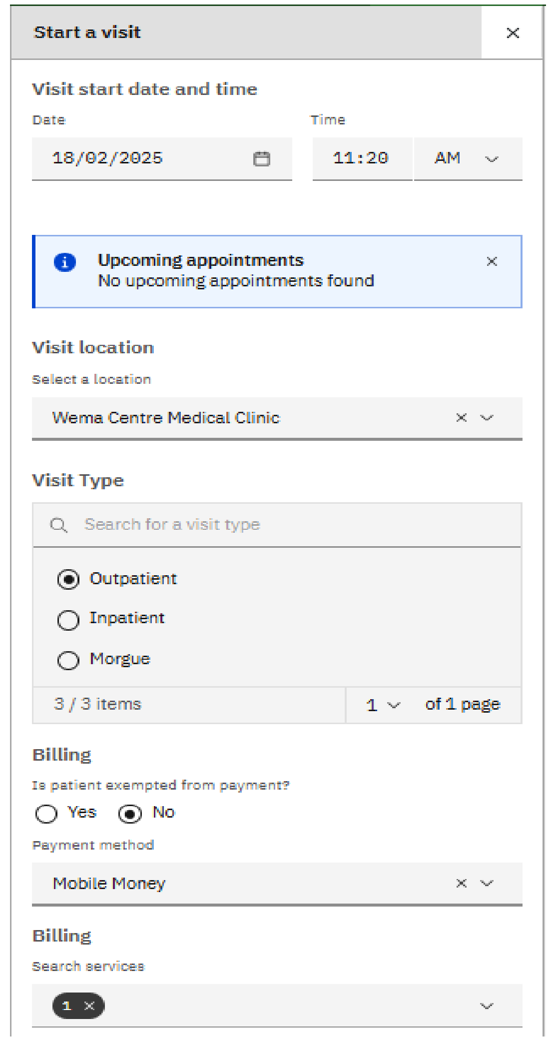
The billing module in the Taifa Care system streamlines the billing process by integrating it with patient records and clinical workflows. It allows healthcare providers to generate accurate invoices, submit claims to payers, and track payments efficiently. The module ensures compliance with billing regulations and facilitates revenue cycle management.

The following are key billing tasks supported in the Module:

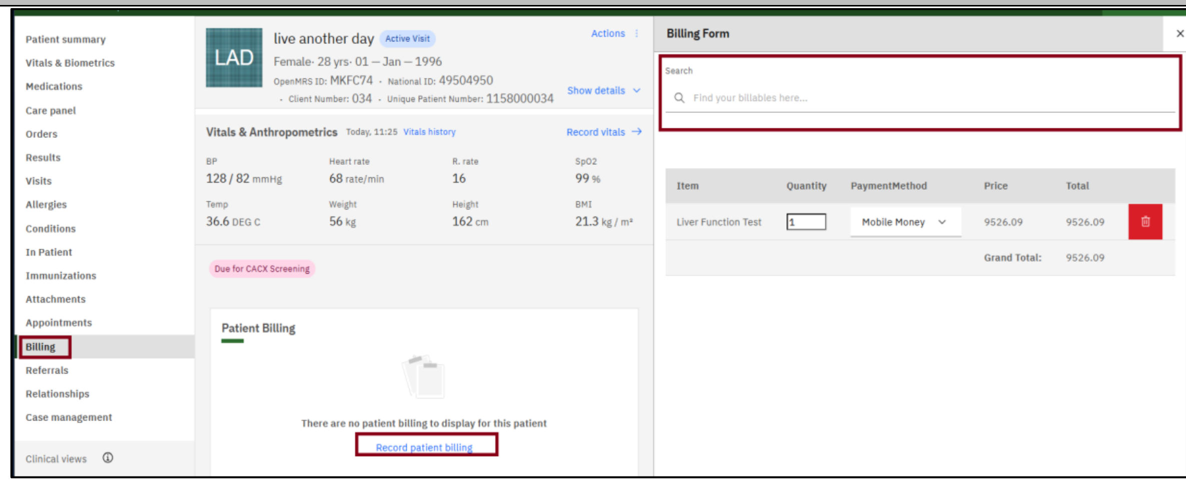
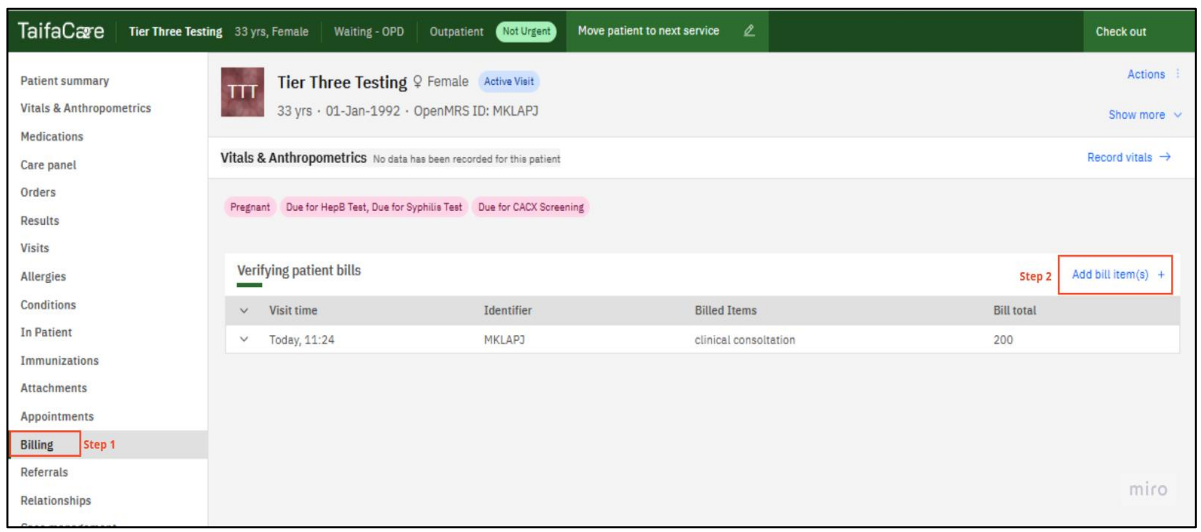
1) Registration Desk Tasks
2) Consultation Desk Tasks
3) Inpatient Department Tasks
4) Revenue/Cash Department Tasks
5) Printing of Bills/Receipts

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.	

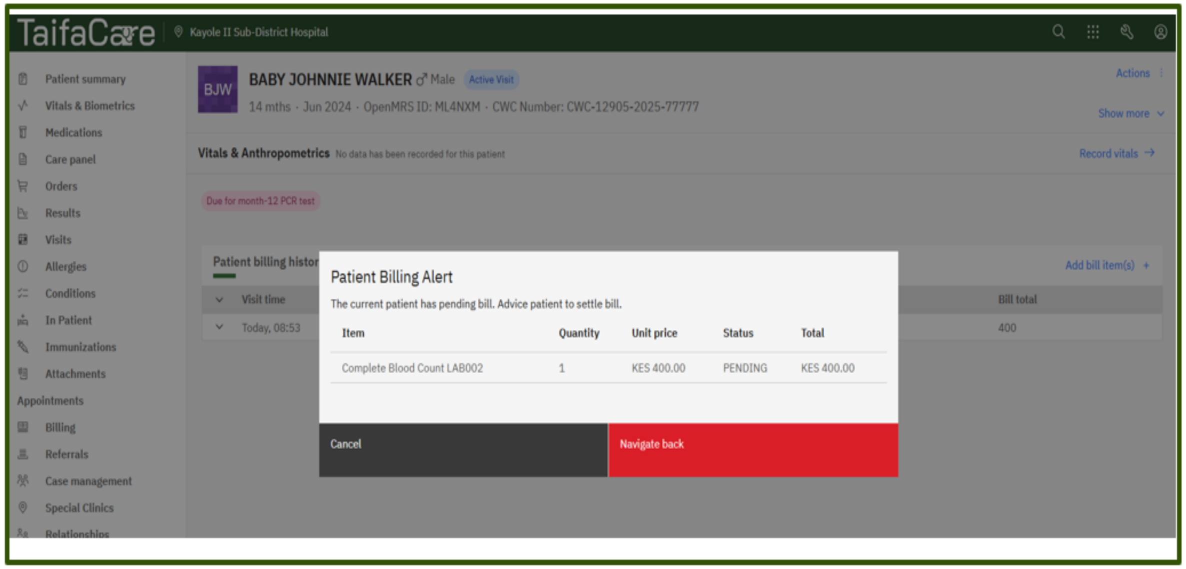
PART 2: Consultation Desk

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	 

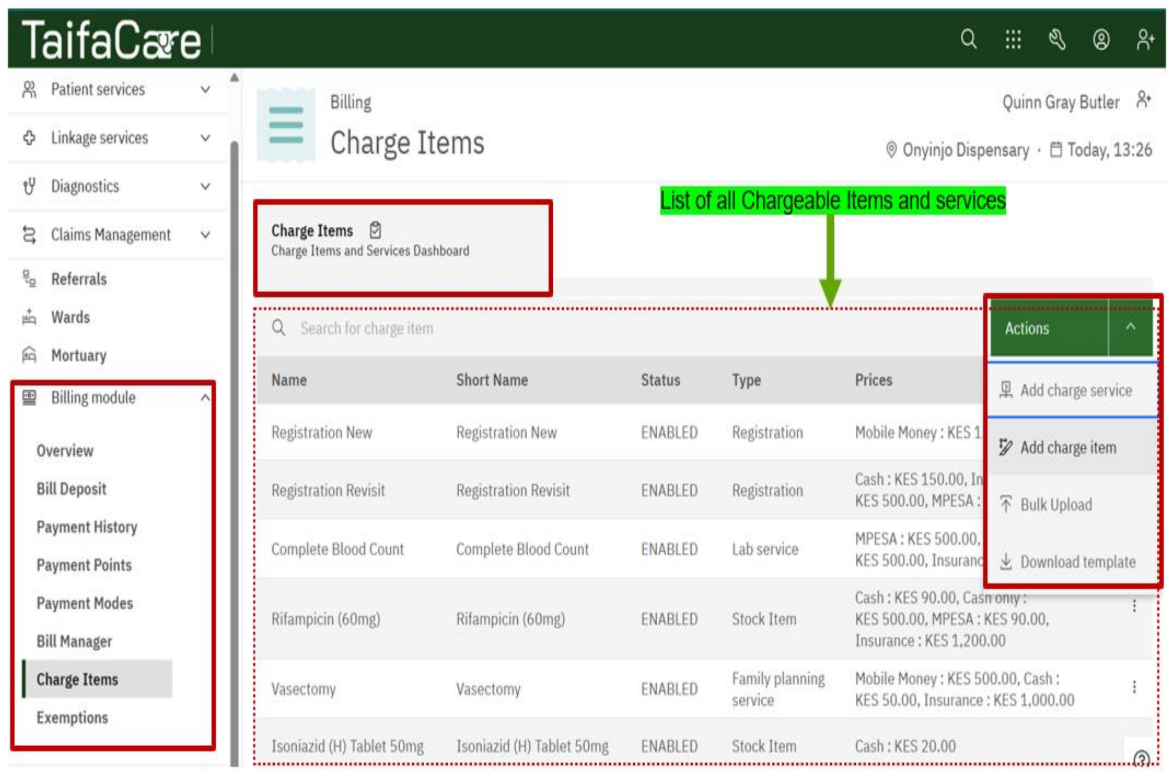
Steps 5: Save and close the items added and they should be visible in the patient Billing panel.

NB:

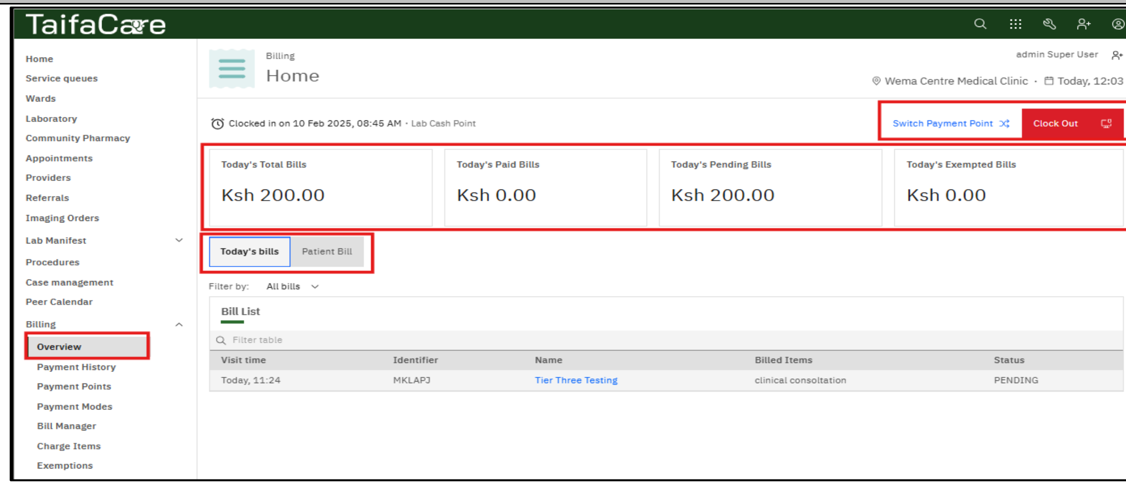
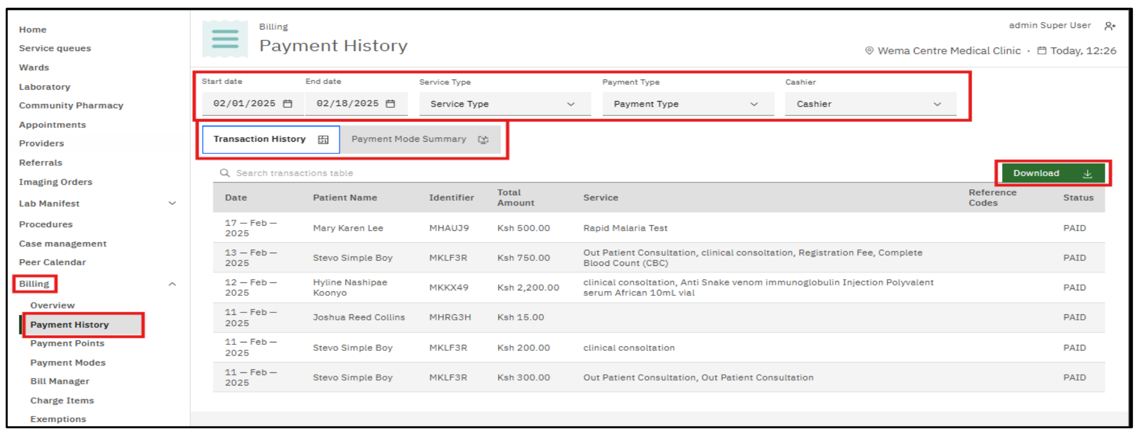
- A patient billing alert will pop up if service provider tries to give services to a patient without settling the bill



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	

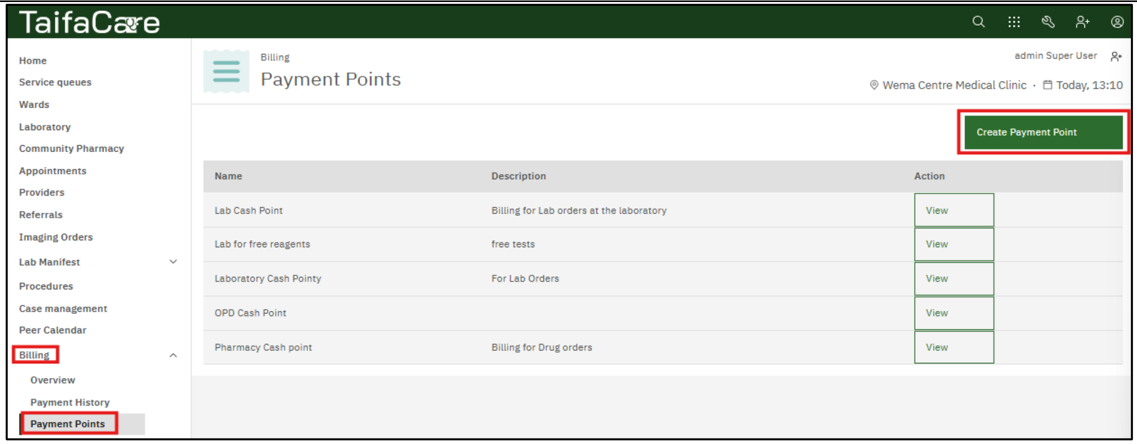
PART 4: Revenue Department/ Cash Office

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	 

Billing Configurations

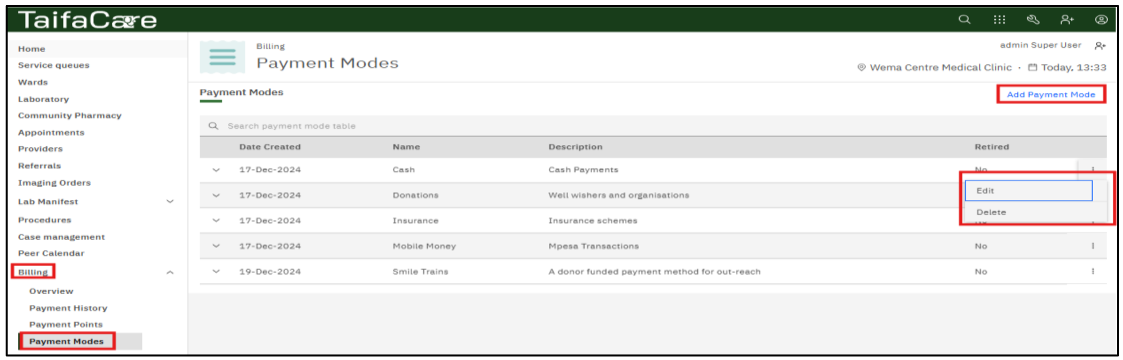
Payment Points

- 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



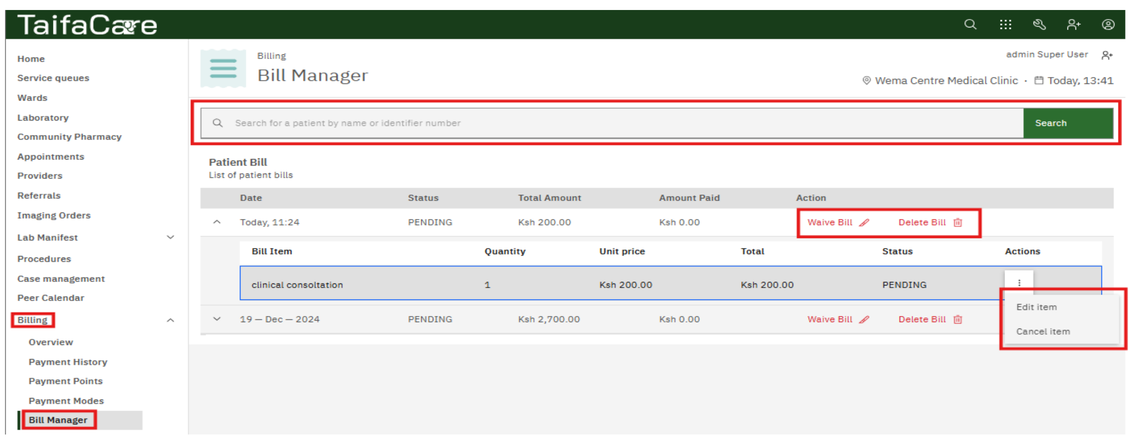
Payment Modes

- User will be able to Create additional Payment Points
- **To add a Payment mode,** click ‘**Add Payment Mode**’ button 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
- Finaly 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



Charge Items

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

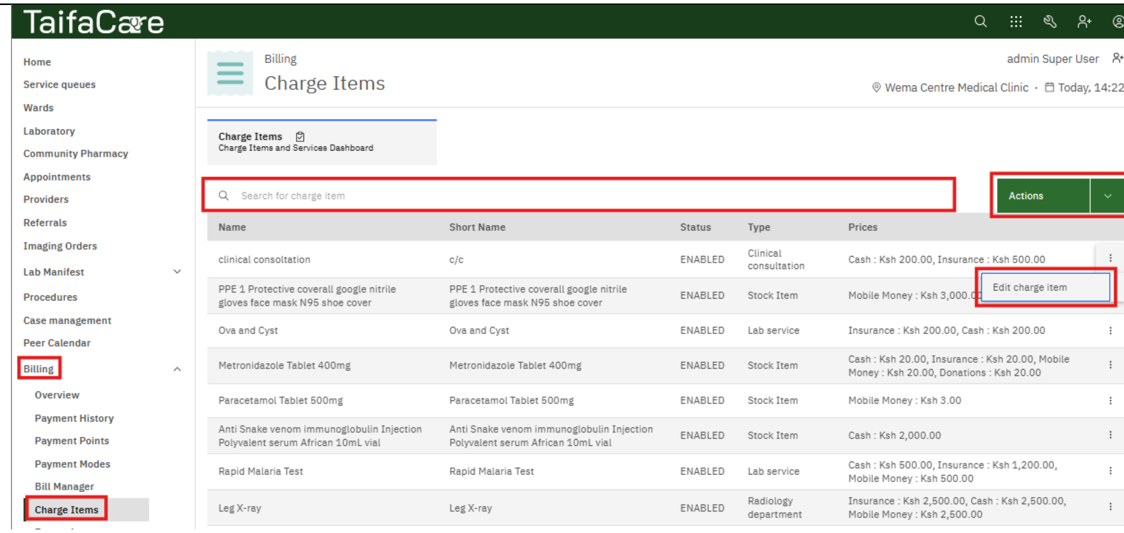
  Actions:

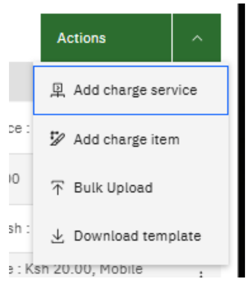
a) **Add Charge Service:** enables a user to add/create a charge service and its cost per payment method

b) **Add Charge Item:** enables a user to add a commodity, its unit cost per payment method

c) **Bulk Upload:** This feature is used for importing billable items from a spreadsheet

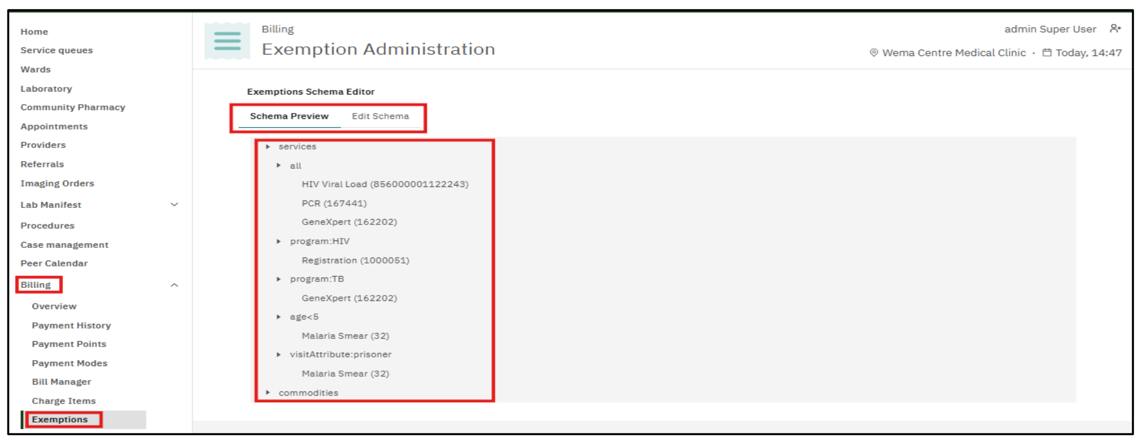
d) **Download template:** This downloads a template used for bulk uploads. Download, update then use step above to upload the items updated.





Exemptions

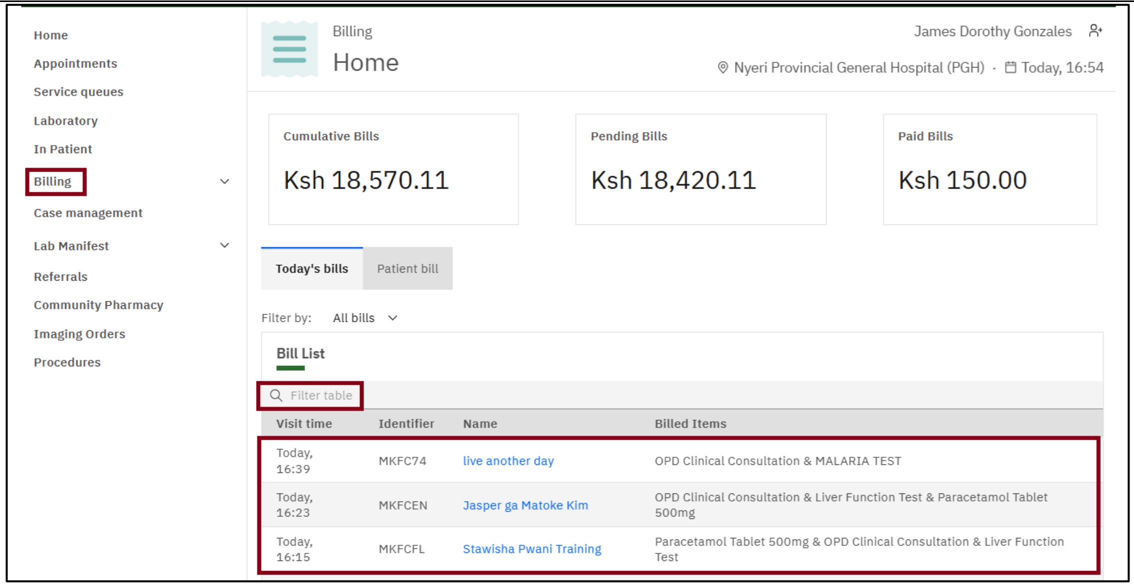
- This will enable a user to configure exemptions
- **Edit Schema** used to update the items/services exempted
- **Schema Preview** is used to view the items configured for exemptions



Billing Processing

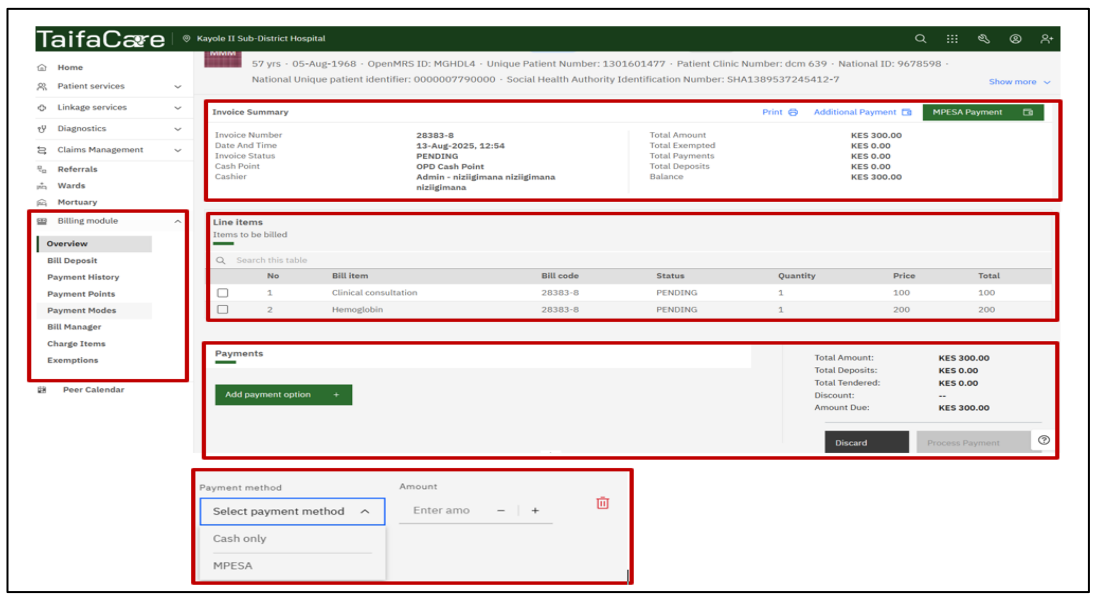
i. Locate patient

- 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)



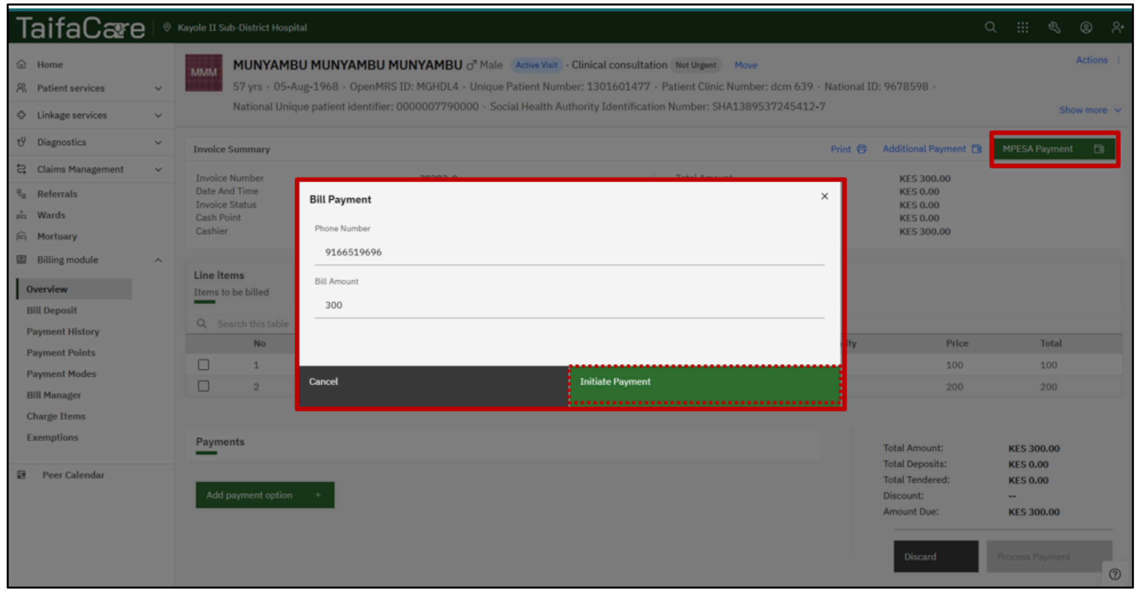
ii. Process Payment

- 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.



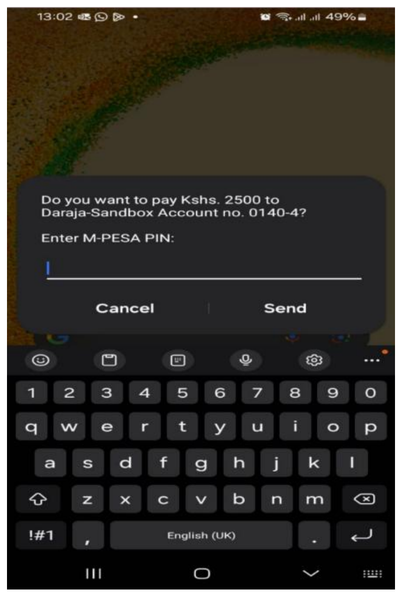
iii. Process Payments via Mobile Money (STK Push)

- **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 2547XXXXXXXX or 25411XXXXXXX
- **Step 2**: Once you have entered the phone number correctly, enter the amount and click on **initiate payment.**

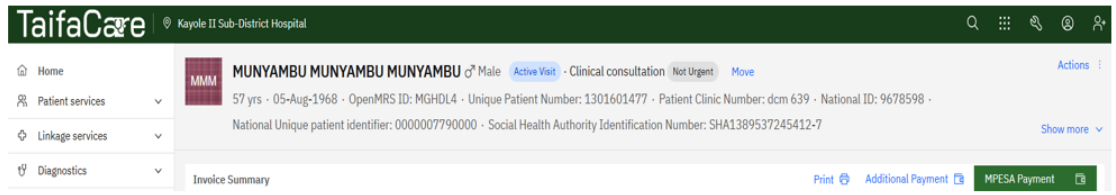
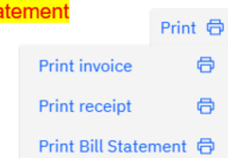
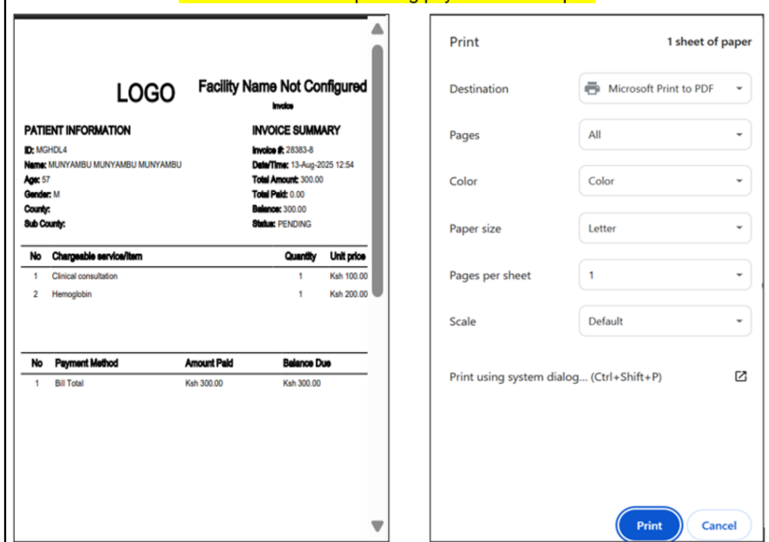


STK PUSH Notification

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



PART 5: Printing Bills and Receipts

No	Task Description	Screenshot
	Printing Options for a Bill **1. 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 

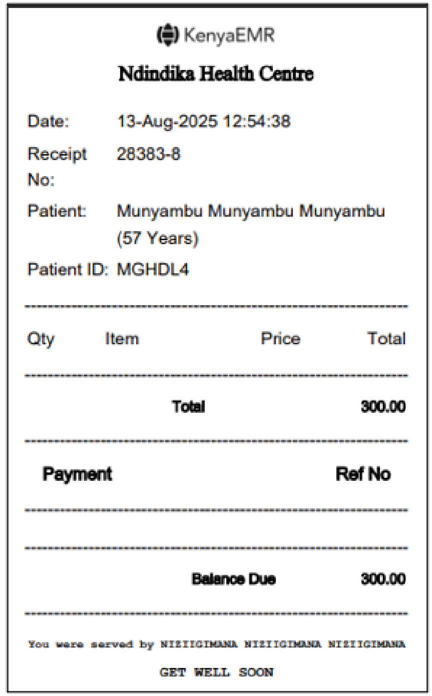
Print Receipt:

- 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

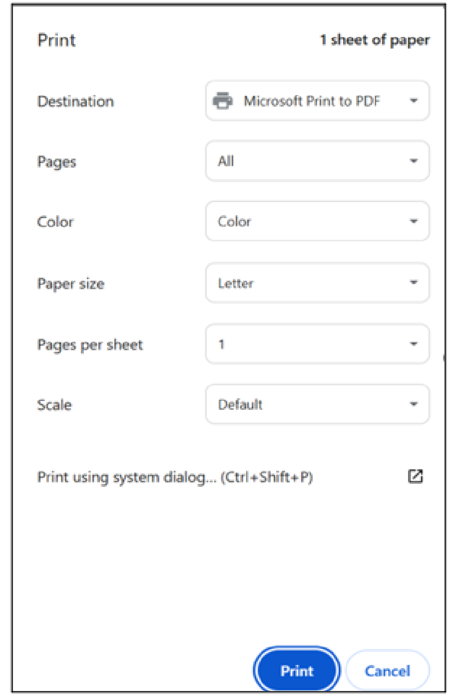
Qty	Item	Price	Total
	Total		**300.00**

Payment	**Ref No**

Balance Due	**300.00**

You were served by NIZIIGIMANA NIZIIGIMANA NIZIIGIMANA

GET WELL SOON



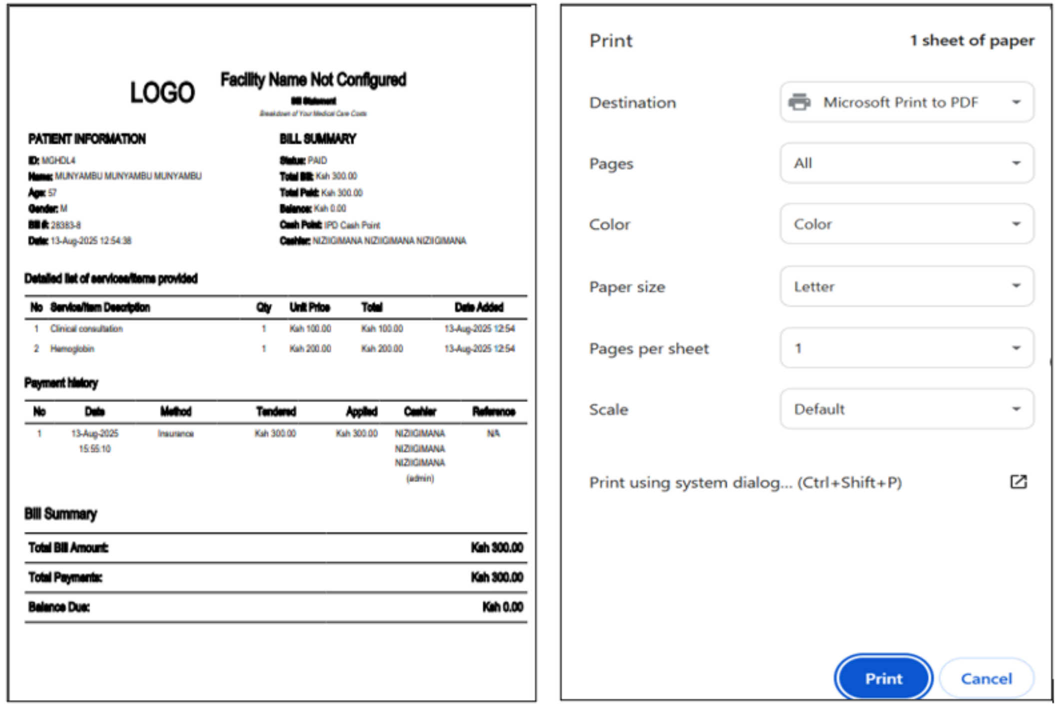
Printing a Bill Statement

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.



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