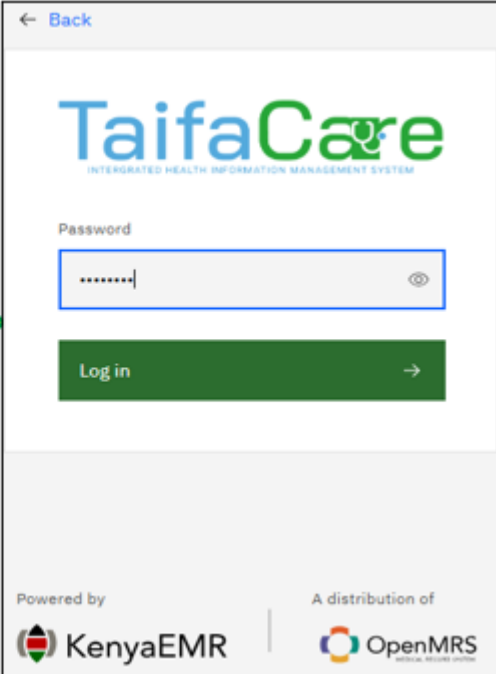


SOP: How to Document OTZ Services in TaifaCare

Tasks:	Using OTZ Module in TaifaCare
Objective:	To support use of OTZ Module and provide necessary services using the module
Who:	Healthcare providers, Counselors, Peer Educators
Required Materials:	Functional TaifaCare Powered by TaifaCare with OTZ module installed
Version:	TaifaCare Version 19.2.0 and above
Last Updated:	August 2025

Step	Action	Screen shots
Introduction	This document provides detailed workflow for use of OTZ module on TaifaCare system. The guide has been accompanied by relevant screenshot images for illustration purposes. The step-by-step guide is clustered into groups of related workflows for ease of reference.	Refer to images
Learning Objectives	By the end of this session, you will be able to: • Successfully log into TaifaCare • Enroll clients in OTZ module. • Complete OTZ activity form • Discontinue client from OTZ module and • Generate OTZ reports	

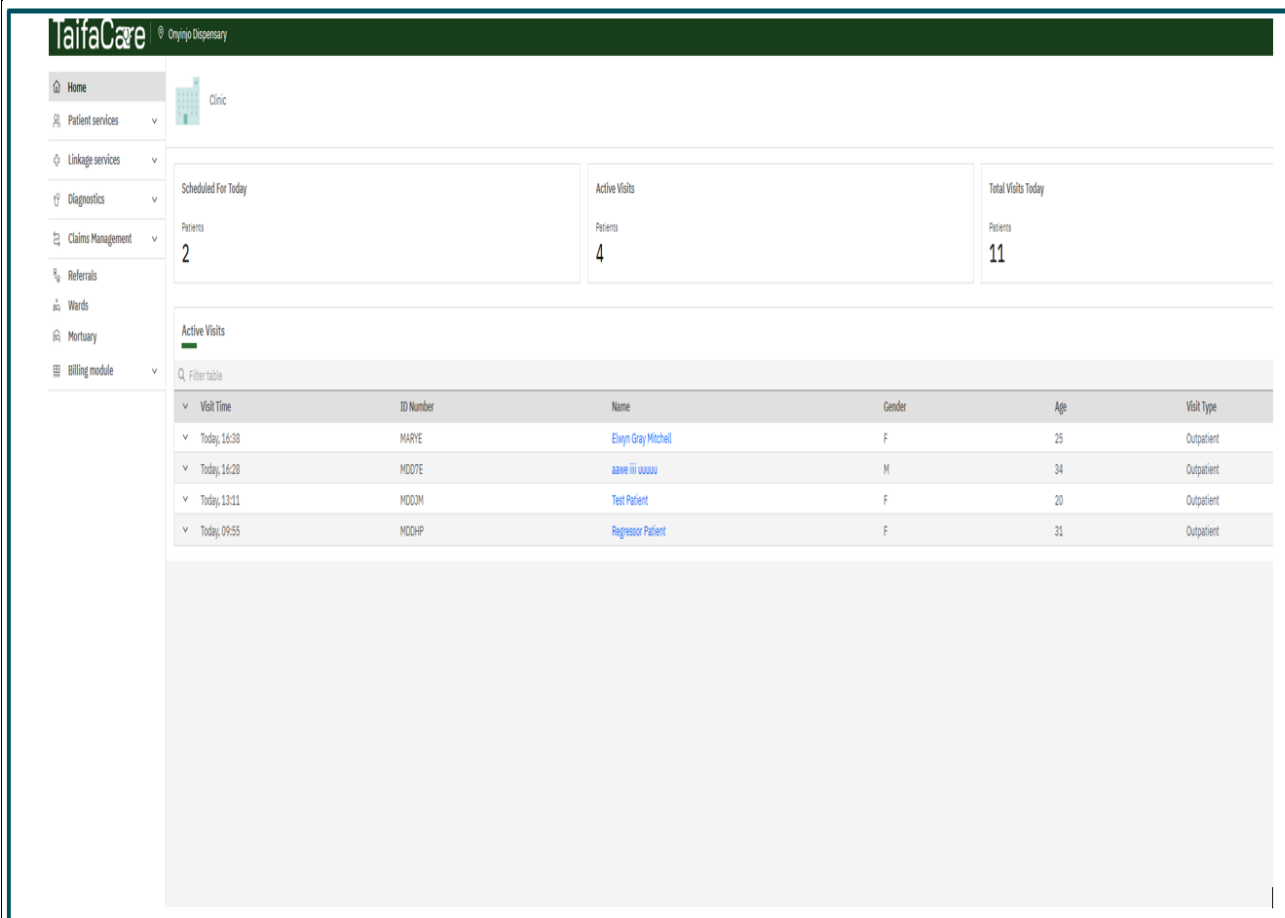
1. Login and Registration		
Log into TaifaCare	Before using OTZ module, the user is required to gain access into TaifaCare system by supplying correct username and password. • Enter Username • Enter Password • Click “Login”	  

Accessing OTZ Services

Step 1:

After a successful login, the TaifaCare Active Visits landing page will be availed.

Requirement: Client MUST be enrolled in HIV module and be between the ages of 10 to 19 years of age before they can access OTZ services.



The screenshot shows the TaifaCare Onyipo Dispensary interface. On the left is a sidebar menu with options: Home, Patient services, Linkage services, Diagnostics, Claims Management, Referrals, Wards, Mortuary, and Billing module. The main content area displays a dashboard with three summary cards: 'Scheduled For Today' (2 Patients), 'Active Visits' (4 Patients), and 'Total Visits Today' (11 Patients). Below these cards is a table titled 'Active Visits' with a search filter. The table has columns for Visit Time, ID Number, Name, Gender, Age, and Visit Type. It lists four active visits for 'Today'.

Visit Time	ID Number	Name	Gender	Age	Visit Type
Today, 16:38	MARYE	Elwyn Gray Mitchell	F	25	Outpatient
Today, 16:28	MDOOTE	aswe iii uuuu	M	34	Outpatient
Today, 13:11	MDOOM	Test Patient	F	20	Outpatient
Today, 09:55	MDOHP	Repressor Patient	F	31	Outpatient

Searching for eligible OTZ clients

Step 3: Search for client newly eligible for OTZ services.

- Clients already enrolled in HIV Care aged 10yrs to 19yrs, or
- Up to 24 years for existing clients in the OTZ program.

Onyia Dispensary

Test Patient

1 search result

TP Test Patient Active Visit
Female - 17 yrs, 5 mths - QueenMRS ID: MDCDH

Scheduled For Today

Patients
2

Active Visits

Patients
4

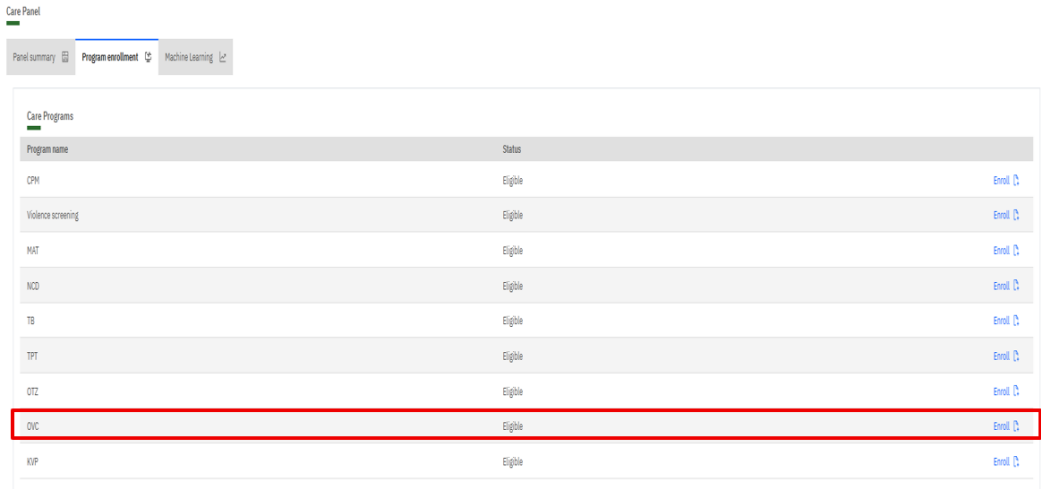
Total Visits Today

Patients
11

Active Visits

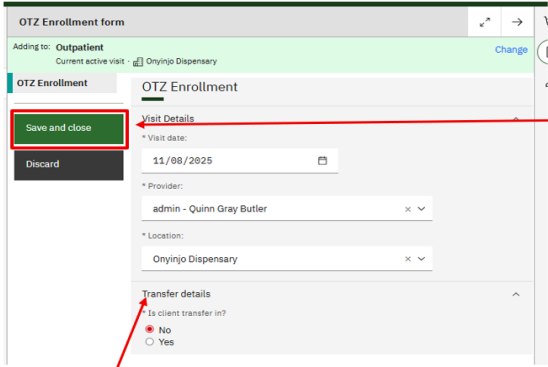
Filter table

Visit Time	ID Number	Name	Gender	Age	Visit Type
Today, 16:38	MARIYE	Elwyn Gray Mitchell	F	25	Outpatient
Today, 16:28	MDCOTE	aaave iii uuuuu	M	34	Outpatient
Today, 13:11	MDCDH	Test Patient	F	17	Outpatient
Today, 09:55	MDCDH	Regressor Patient	F	31	Outpatient

Accessing OTZ Module	Step 4: OTZ module on Care Panel To access OTZ module on client homepage, check in the client. • If the client meets all the criteria above, the OTZ module be available on the client care panel program for enrollment as highlighted. Click on the enroll button to enroll the clients in the OTZ module. • Note: OTZ service highlighted will not be available for newly created patients until you successfully enroll the client into the HIV service	 Care Panel Panel summary Program enrollment Machine Learning Care Programs <table border="1"> <thead> <tr> <th>Program name</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>CPH</td> <td>Eligible</td> <td>Enroll</td> </tr> <tr> <td>Violence screening</td> <td>Eligible</td> <td>Enroll</td> </tr> <tr> <td>MAT</td> <td>Eligible</td> <td>Enroll</td> </tr> <tr> <td>NCD</td> <td>Eligible</td> <td>Enroll</td> </tr> <tr> <td>TB</td> <td>Eligible</td> <td>Enroll</td> </tr> <tr> <td>TPT</td> <td>Eligible</td> <td>Enroll</td> </tr> <tr> <td>OTZ</td> <td>Eligible</td> <td>Enroll</td> </tr> <tr> <td>OVC</td> <td>Eligible</td> <td>Enroll</td> </tr> <tr> <td>KVP</td> <td>Eligible</td> <td>Enroll</td> </tr> </tbody> </table>	Program name	Status		CPH	Eligible	Enroll	Violence screening	Eligible	Enroll	MAT	Eligible	Enroll	NCD	Eligible	Enroll	TB	Eligible	Enroll	TPT	Eligible	Enroll	OTZ	Eligible	Enroll	OVC	Eligible	Enroll	KVP	Eligible	Enroll
Program name	Status																															
CPH	Eligible	Enroll																														
Violence screening	Eligible	Enroll																														
MAT	Eligible	Enroll																														
NCD	Eligible	Enroll																														
TB	Eligible	Enroll																														
TPT	Eligible	Enroll																														
OTZ	Eligible	Enroll																														
OVC	Eligible	Enroll																														
KVP	Eligible	Enroll																														

OTZ Enrollment Form

Select **Yes** if the client is a transfer-in and **No** if the client is not a transfer-in



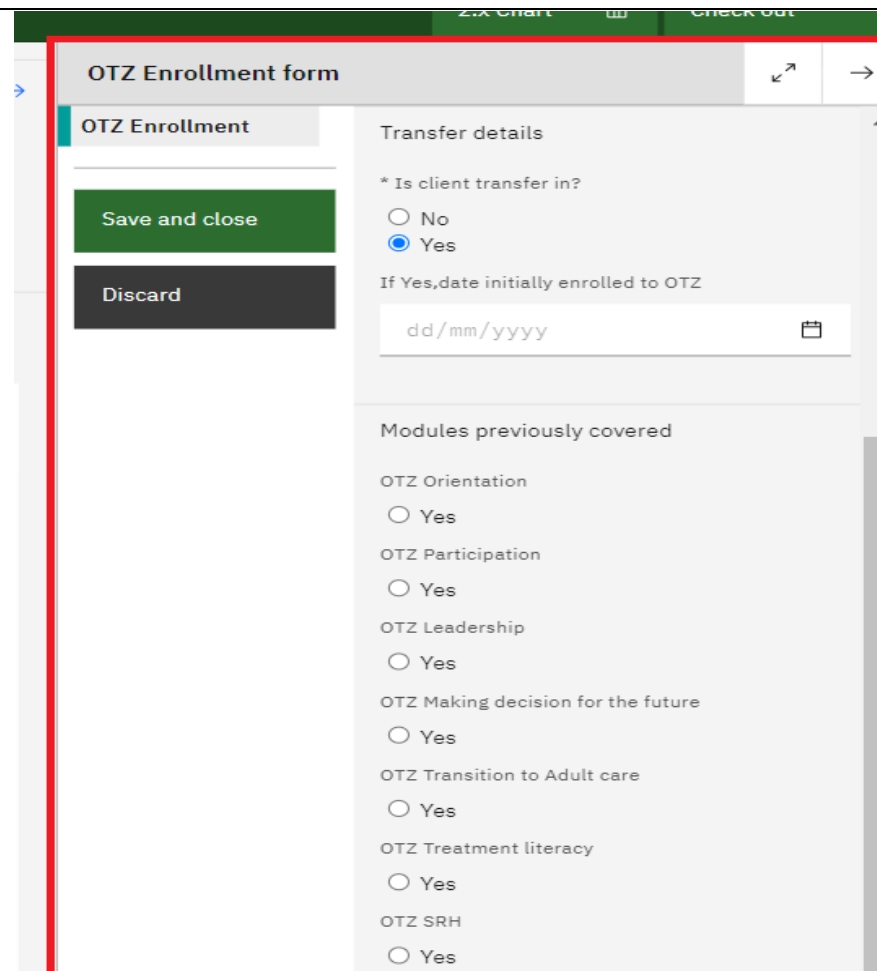
The screenshot shows the 'OTZ Enrollment form' interface. On the left, there are two buttons: 'Save and close' (highlighted with a red box) and 'Discard'. On the right, the 'Visit Details' section includes fields for 'Visit date' (11/08/2025), 'Provider' (admin - Quinn Gray Butler), and 'Location' (Onyirjo Dispensary). Below this is the 'Transfer details' section with a radio button selection for 'Is client transfer in?' where 'No' is selected. Red arrows point from the text annotations to these specific elements.

Save and Close the Enrollment Form to make the necessary changes

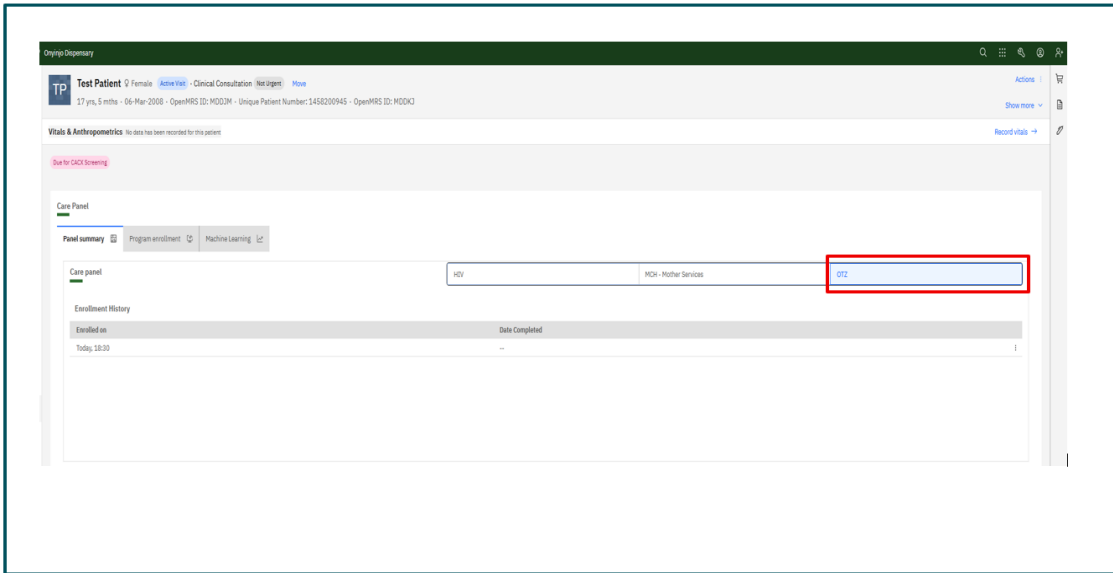
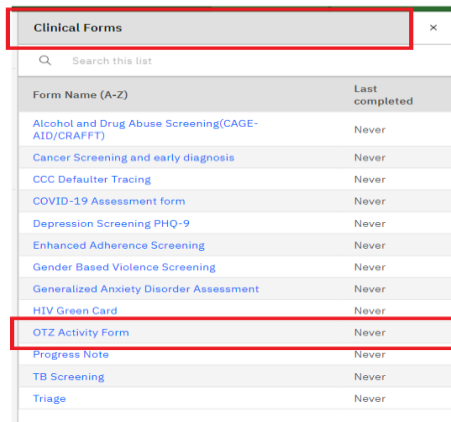
Indicate whether client is new or Transfer In

OTZ Enrollment Form

- If **yes**, indicate modules previously covered by checking the radio button against each. Using the calendar indicates date when the modules were covered.
- Click **Enter** to save the OTZ enrollment form



The screenshot shows the 'OTZ Enrollment form' interface. It features a title bar with a close button and a maximize button. Below the title bar is a tab labeled 'OTZ Enrollment'. On the left side, there are two buttons: 'Save and close' (green) and 'Discard' (dark grey). The main content area is divided into two sections. The top section, 'Transfer details', contains a question '* Is client transfer in?' with radio buttons for 'No' and 'Yes' (selected). Below this is a date field labeled 'If Yes, date initially enrolled to OTZ' with a placeholder 'dd/mm/yyyy' and a calendar icon. The bottom section, 'Modules previously covered', lists several modules with radio buttons for 'Yes' or 'No': OTZ Orientation, OTZ Participation, OTZ Leadership, OTZ Making decision for the future, OTZ Transition to Adult care, OTZ Treatment literacy, and OTZ SRH. All 'Yes' options are selected.

OTZ Enrollment Form	To confirm successful enrollment, under care panel, navigate to panel summary, you will see OTZ as highlighted	
OTZ Activity Form	After successful enrollment of the client in the OTZ module, the OTZ activity form will automatically be availed under Clinical forms.	

Completing Activity forms

- Click OTZ Activity Form to update OTZ services provided today (Select all that apply),
- View the previously completed services and update support group involvement and remarks
- After updating all fields, click on enter to save the OTZ Activity Form

OTZ Activity Form

OTZ Modules

Save and close

Discard

Modules completed today

OTZ Orientation

☐ Yes

OTZ Participation

☐ Yes

OTZ Leadership

☐ Yes

OTZ Making decision for the future

☒ Yes

OTZ Transition to Adult care

☒ Yes

OTZ Treatment literacy

☐ Yes

OTZ SRH

☐ Yes

OTZ Beyond the 3rd 90

☐ Yes

Support group involvement

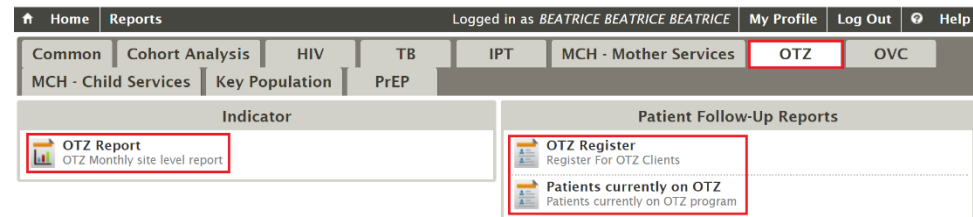
* Support group involvement

☐ No

☒ Yes

Accessing OTZ Reports

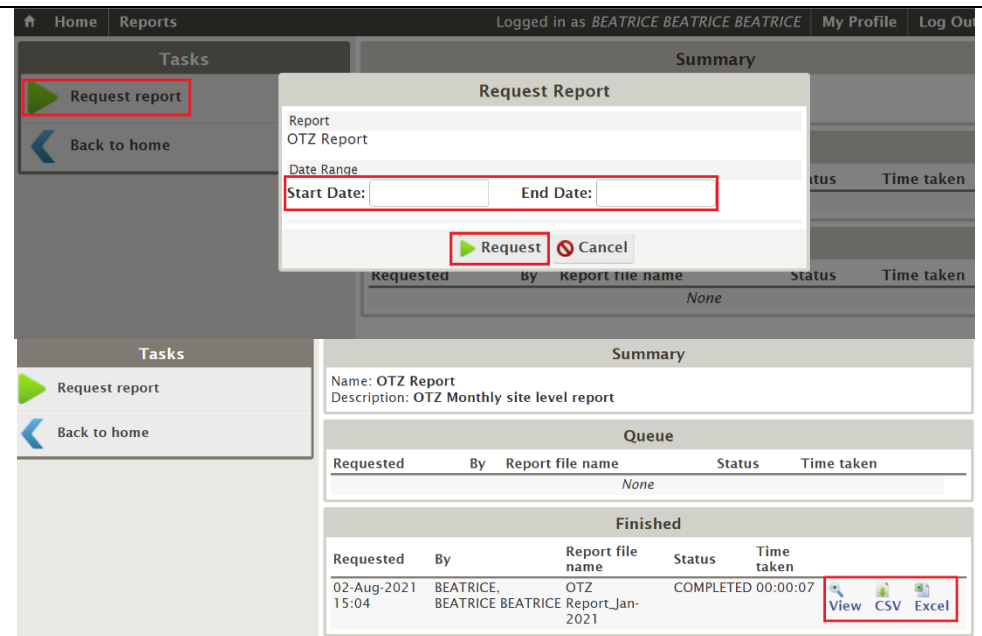
- To access OTZ reports and register, navigate to TaifaCare home page and click on **Reports** Icon
- Then navigate to the OTZ section to access the OTZ line list, OTZ Report and OTZ Register



The screenshot shows the KeHMIS Reports interface. At the top, there is a navigation bar with 'Home' and 'Reports' tabs. The user is logged in as 'BEATRICE BEATRICE BEATRICE'. Below the navigation bar, there are several menu items: 'Common', 'Cohort Analysis', 'HIV', 'TB', 'IPT', 'MCH - Mother Services', 'OTZ', and 'OVC'. The 'OTZ' menu item is highlighted with a red box. Below the menu, there are two main sections: 'Indicator' and 'Patient Follow-Up Reports'. In the 'Indicator' section, there is a link for 'OTZ Report' (OTZ Monthly site level report) which is also highlighted with a red box. In the 'Patient Follow-Up Reports' section, there are two links: 'OTZ Register' (Register For OTZ Clients) and 'Patients currently on OTZ' (Patients currently on OTZ program), both of which are highlighted with red boxes.

Requesting OTZ Reports

- Click on any of the OTZ Reports and request report for the period of interest as highlighted.
- You can also request a line list of OTZ clients under “Patients Currently on OTZ” report.
- The report will generate and appear under finished. Click on either view, CSV or Excel to access the reports

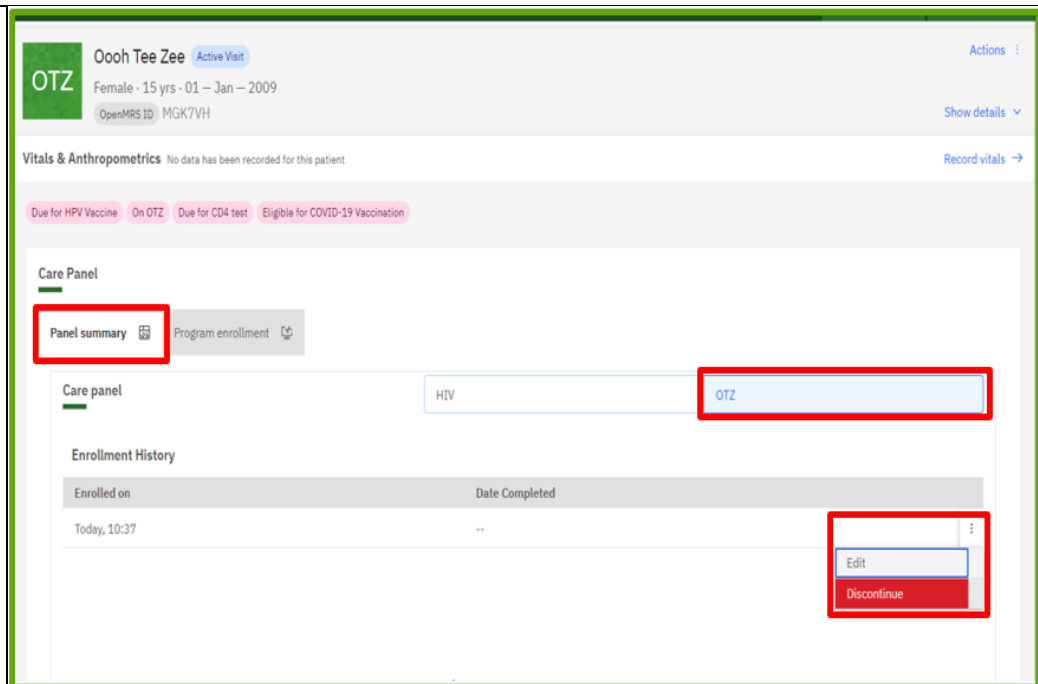


The screenshot shows the KeHMIS Reports interface. The top navigation bar includes 'Home', 'Reports', and user information 'Logged in as BEATRICE BEATRICE BEATRICE'. The 'Reports' section is active, showing a 'Tasks' sidebar with 'Request report' and 'Back to home' options. A 'Request Report' modal is open, allowing selection of a report (OTZ Report) and a date range (Start Date and End Date). The modal has 'Request' and 'Cancel' buttons. Below the modal, the 'Summary' section shows the report name 'OTZ Report' and description 'OTZ Monthly site level report'. The 'Queue' section is empty. The 'Finished' section displays a table of completed reports.

Requested	By	Report file name	Status	Time taken	
02-Aug-2021 15:04	BEATRICE, BEATRICE BEATRICE	OTZ Report_Jan-2021	COMPLETED	00:00:07	View CSV Excel

Discontinuation from OTZ Module

- To discontinue a client from OTZ for one reason or the other follow the procedure below.
- Go to Care panel, then click panel Summary under OTZ module, click on three dots as shown with the arrow to access OTZ discontinuation form



The screenshot displays the OTZ module interface for a patient named Oooh Tee Zee. The patient's details include gender (Female), age (15 yrs), and date of birth (01 Jan 2009). The 'Care Panel' section shows the 'Panel summary' tab selected, with a red box highlighting it. Below this, the 'Enrollment History' table is visible, showing the patient was enrolled on 'Today, 10:37'. A red box highlights the 'Discontinue' button in the bottom right corner of the enrollment history table.

Enrolled on	Date Completed
Today, 10:37	--

Discontinuation from OTZ Module

- Using the drop-down menu, select the reason for discontinuation and enter the form to save the discontinuation encounter

OTZ Discontinuation Form

OTZ Discontinuation

Save and close

Discard

OTZ Discontinuation

Visit Details

Date:

3/26/2024

Provider:

admin - MUNGATHI MUNGATHI M... x v

Location:

Meru District hospital x v

OTZ Discontinuation Details

* Reason for discontinuation:

Transition to Adult Care
Lost to followup
Opt out of OTZ
Transferred Out
Died

THE END