SOP: TaifaCare e-Claims processing

(Last update: August 2025)

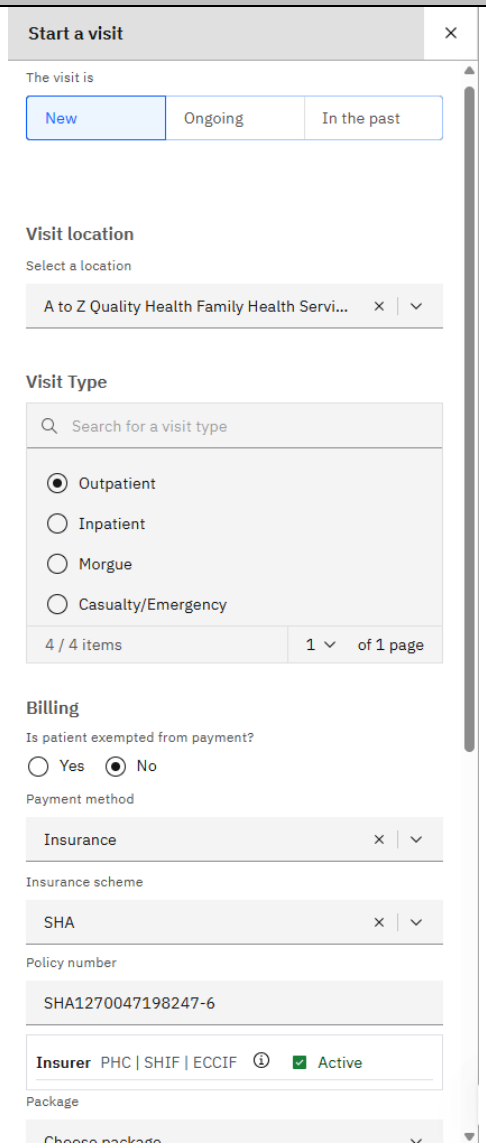
TASK:	To guide users on how to navigate & process eclaims in TaifaCare
OBJECTIVE:	Effectively process insurance claims within a facility.
WHO:	Finance Department, Billing Cashier
REQUIRED MATERIALS:	Functional TaifaCare **Version 19.2.0 and above, Facility SHA Token Configuration**

SUMMARY:

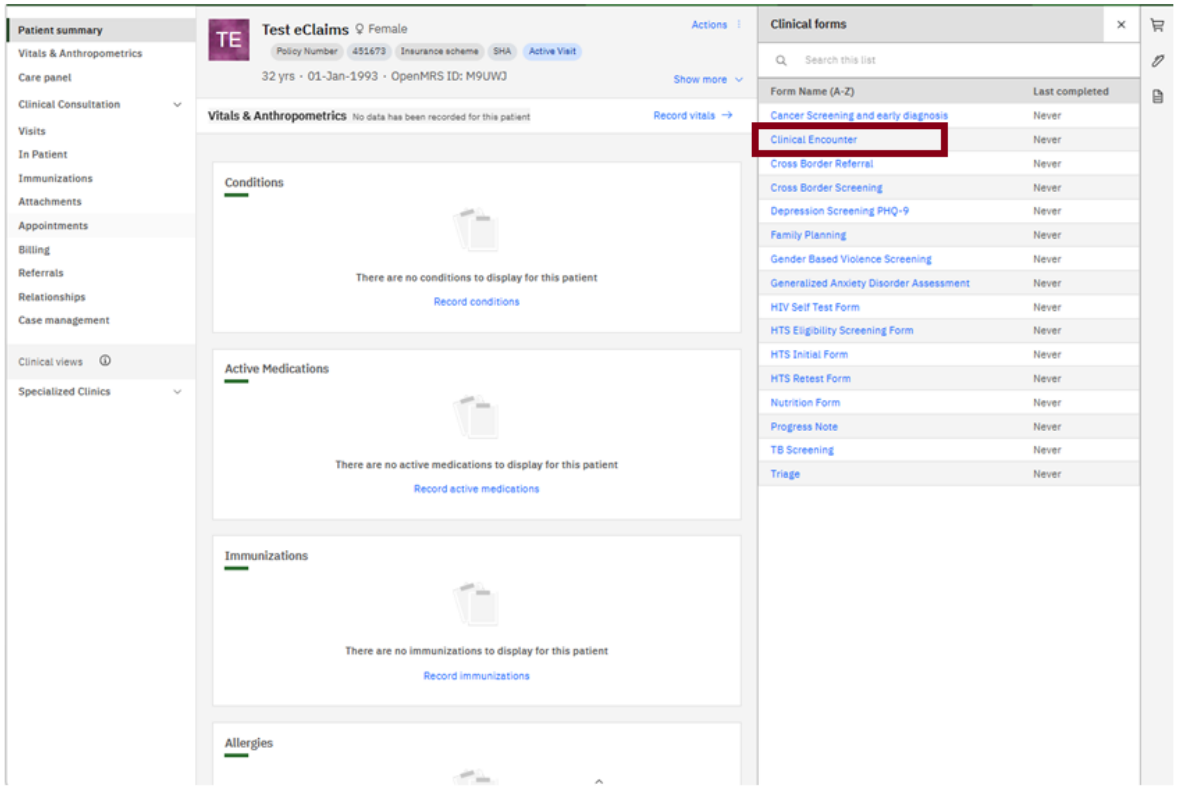
The e-claim processing feature in TaifaCare allows facilities to comfortably process insurance claims and the captured information shared from TaifaCare to the insurance databases through the HIE system.

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

It should be noted that for e-claims to be achieved from TaiafaCare, the facility EMR must be configured with the correct Token that grants facility access to the Social Health Authority (SHA) portal via the Health Information Exchange protocol.

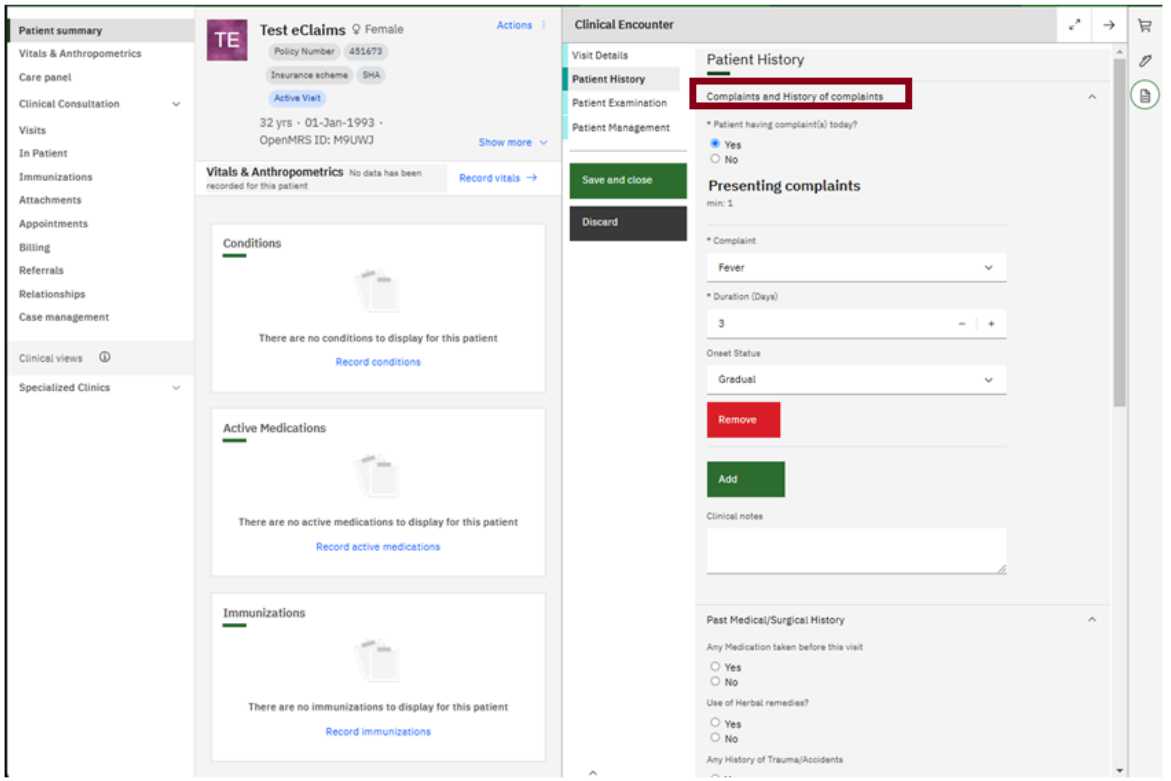
No	Task Description	Screenshot
1	**Key Tasks** i. **New Patient** Refer to **Patient Registration SOP** available on our website **Existing Patient** ● Search for the patient ● Click check in for the visit. ● Specify visit type ● Specify Payment Details ● Specify Payment methods (Insurance) ● Select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

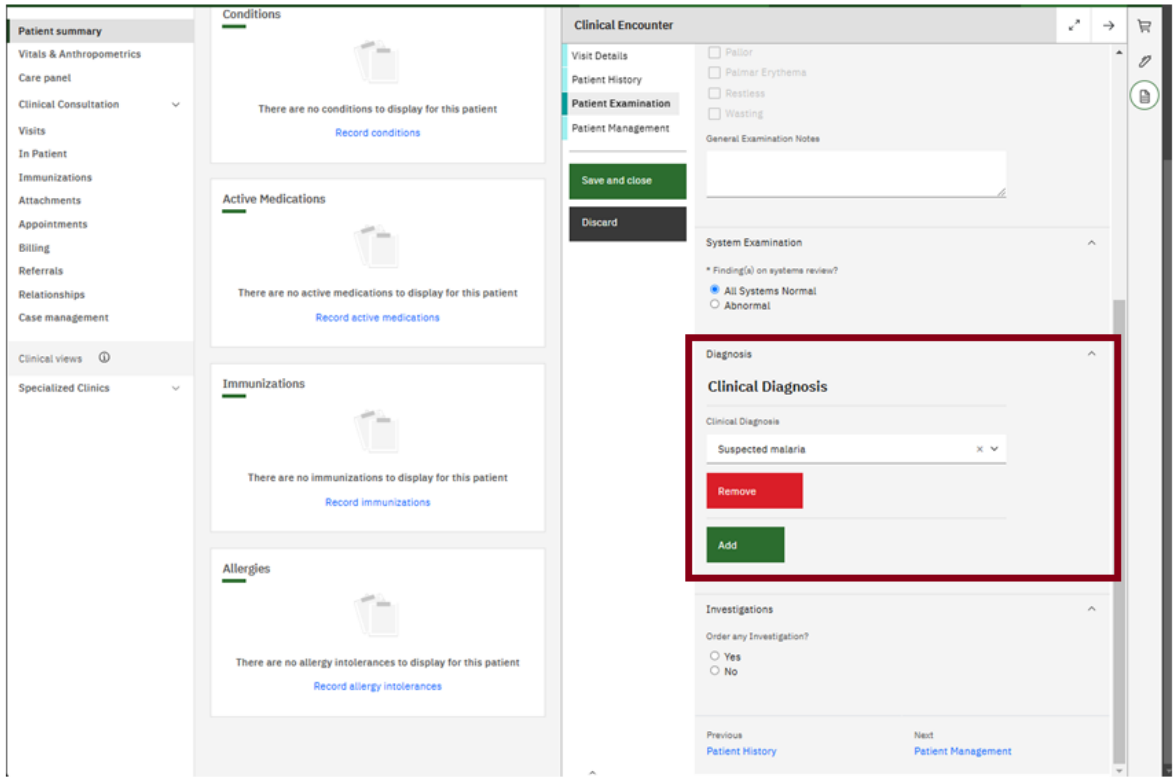
PART 2: Consultation Desk

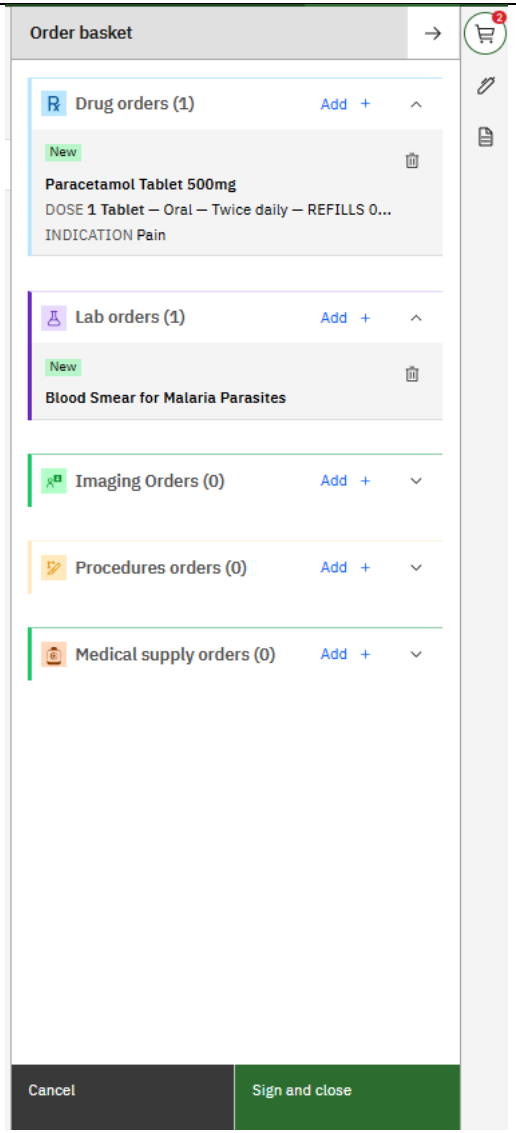
No	Task Description	Screenshot
2	**I. Complete the Clinical Encounter Form** • Click in the forms tab then access the clinical Encounter Form as highlighted	

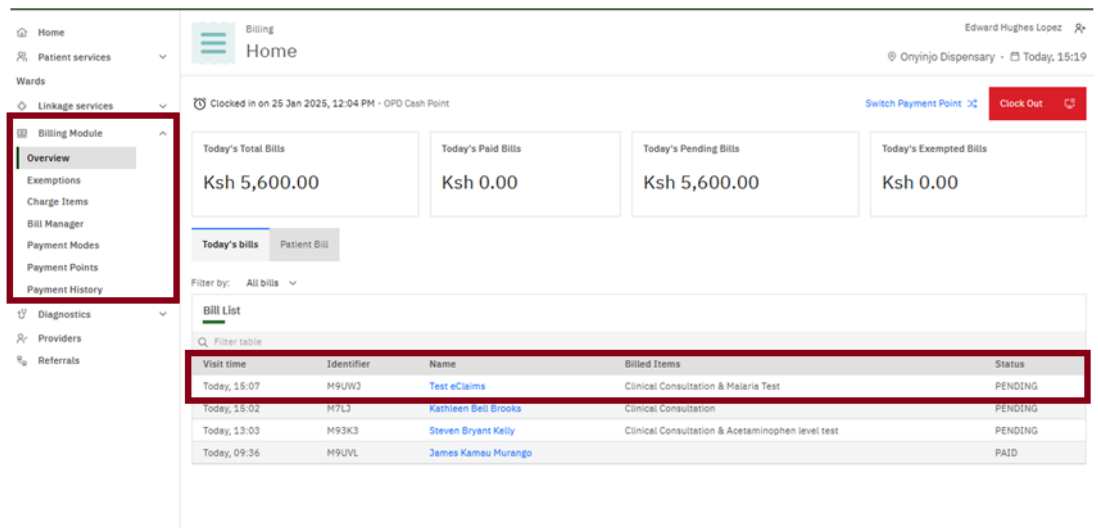
II. Once the form is opened, fill in the form with the required information. Key areas that must be completed for the processing claims:

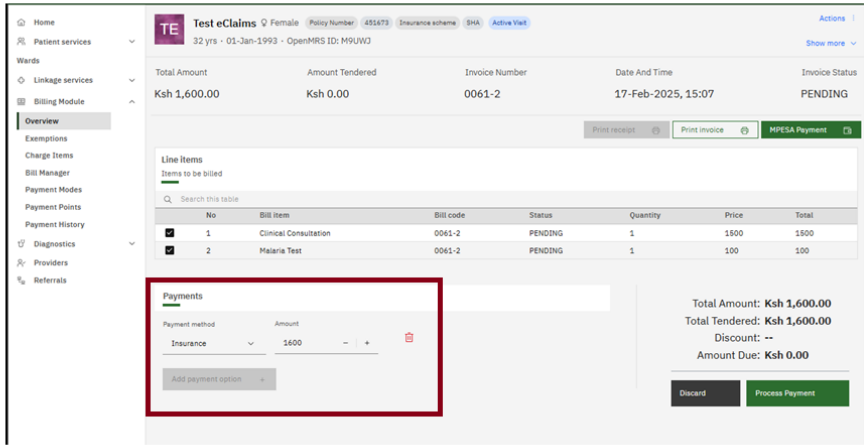
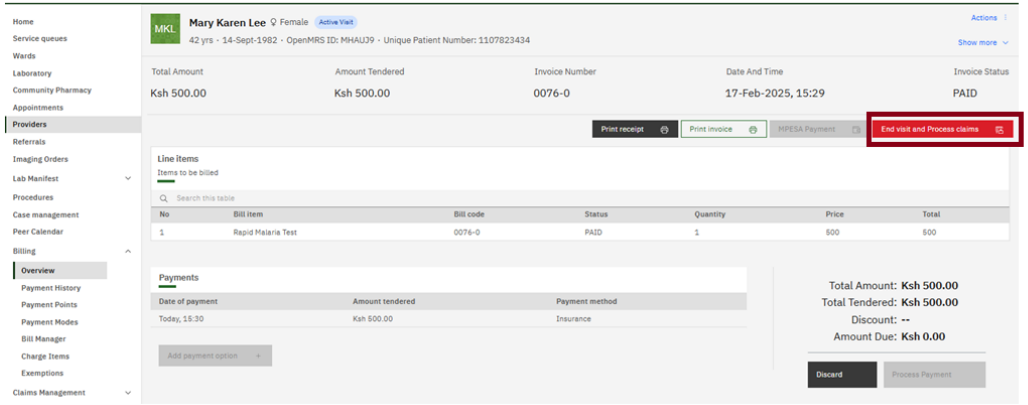
- Document presenting complaints as highlighted
- Document Clinical & Final Diagnosis

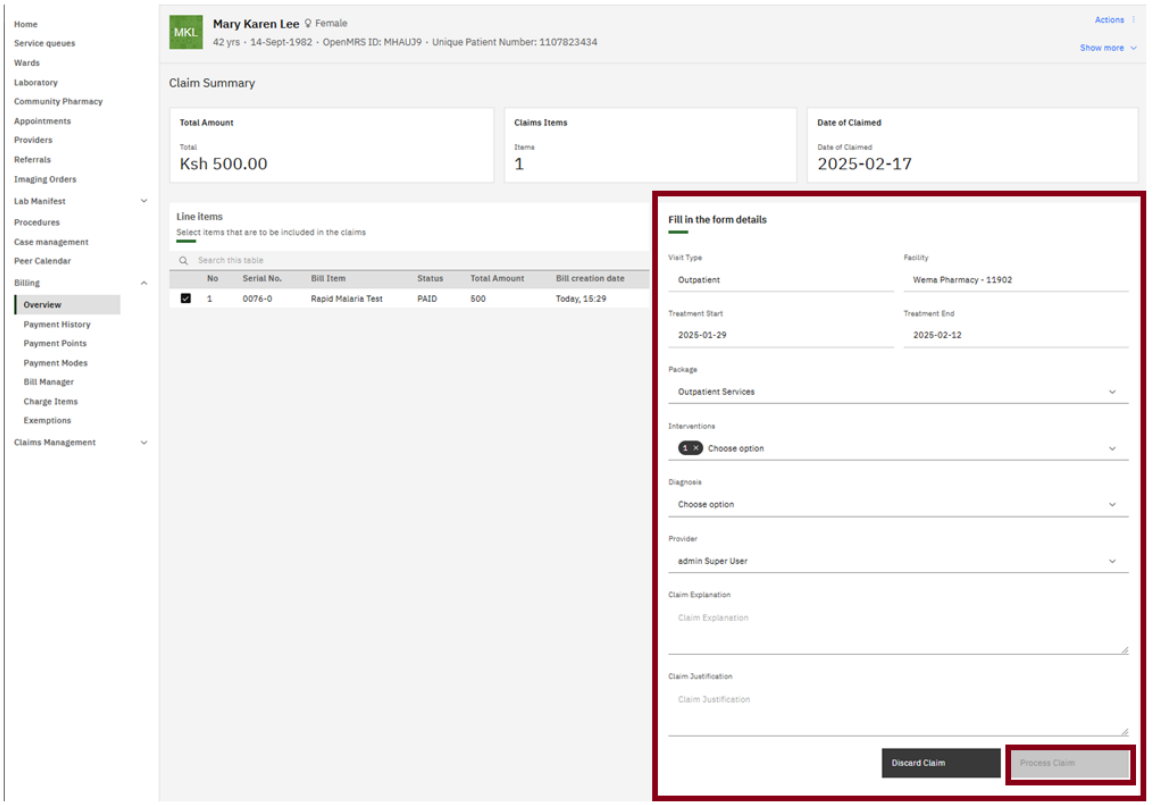



Patient summary
Vitals & Anthropometrics
Care panel
Clinical Consultation
Visits
In Patient
Immunizations
Attachments
Appointments
Billing
Referrals
Relationships
Case management
Clinical views
Specialized Clinics
Conditions
There are no conditions to display for this patient
Record conditions
Active Medications
There are no active medications to display for this patient
Record active medications
Immunizations
There are no immunizations to display for this patient
Record immunizations
Allergies
There are no allergy intolerances to display for this patient
Record allergy intolerances
Clinical Encounter
Visit Details
Patient History
Patient Examination
Patient Management
Save and close
Discard
Pallor
Palmar Erythema
Restless
Wasting
General Examination Notes
System Examination
* Finding(s) on systems review?
All Systems Normal
Abnormal
Diagnosis
Clinical Diagnosis
Clinical Diagnosis
Suspected malaria
Remove
Add
Investigations
Order any Investigation?
Yes
No
Previous
Patient History
Next
Patient Management

3	I. **After completing the clinical Encounter Form, open the order basket and complete the orders given to the client for that visit.** • **Complete a Lab order for any ordered lab test** • **Complete a drug order for any prescribed drug then save and close** **Note: These two orders will generate a bill that can be accessed either from the patient's profile or the billing module** ***NB:*** *Refer to the Lab Order SOP and Drug Orders SOP for a detailed explanation on conducting the two in TaifaCare*	

4.	I. Click on the Billing Module to access the services and items billed for the client. Click on the client's name to perform billing.	

5.	I. Select the items to be billed by ticking the box, under payments, select Insurance as the payment method then click on process payment o After the bill has been processed, the process claim button on the far right will be activated.	 

6.	II. Click on Process Claim then complete the claim form. Make sure to select from the list of items, the services or commodities you are claiming from.	

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