

SOP: TaifaCare e-Claims Pre-Authorization Process

(Last update: July 2026)

TASK:	To guide users on how to navigate & process e-Claims in TaifaCare
OBJECTIVE:	Effectively process insurance claims within a facility.
WHO:	Finance Department, Billing Cashier, Clinical Officers
REQUIRED MATERIALS:	Functional TaifaCare Version 19.4.2 and above
SUMMARY: This guide outlines the steps for raising an SHA pre-authorisation request in TaifaCare-K. By following the process, users can submit complete and accurate requests for services that require prior approval, enabling timely review and authorization by SHA before treatment is provided.	
Eligibility Checks Before raising an SHA pre-authorisation request in TaifaCare, users should perform the following eligibility checks to ensure the request can be processed successfully: 1. Confirm Patient Registration - Verify that the patient is registered with SHA and has a valid identification number. - Ensure the patient's demographic details match those recorded in SHA. 2. Verify Active Cover Status - Confirm that the patient's SHA cover is active and valid on the date of service. - Check that there are no issues affecting eligibility, such as inactive membership or missing beneficiary records. 3. Validate Beneficiary Information - Confirm that the patient is the principal member or a registered dependent entitled to receive services.	

- Ensure beneficiary details are correctly linked to the member account.

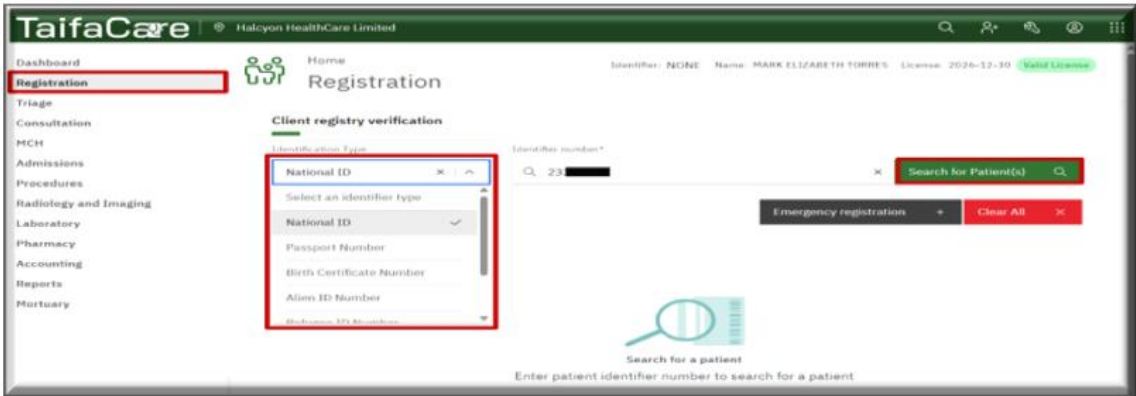
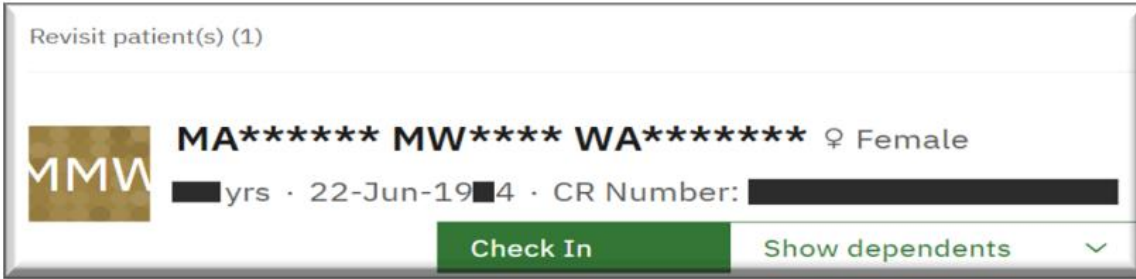
4. Confirm Service Eligibility

- Verify that the requested service, procedure, admission, investigation, or treatment requires pre-authorisation under SHA guidelines.
- Confirm that the service falls within the patient's benefit package and covered benefits.

5. Review Clinical Justification

- Ensure a clear diagnosis has been documented.
- Confirm that clinical notes adequately support the requested intervention.
- Attach all required supporting documents, including laboratory results, imaging reports, referral notes, or treatment plans where applicable.

Pre- Authorization workflow

No	Task Description	Screenshot
1.	Client Identification Refer to Patient Registration SOP available on our website Existing Patient - Search for the patient and confirm they are eligible and active on UHC for either PHC/SHIF - Send OTP for the patient to authorize access to their information. Click check in to start the visit for self or check in applicable dependent	   

2.

Starting a Client Visit

Fill the Visit Check in Form

Visit Details:

- Confirm visit Location
- Specify visit type
- Select Patient Category as Triage.
- Queue Patient for the first point of service.
- Click Start visit to initiate the visit.

The system will display an Outpatient visit has been started successfully.

Start a visit

The visit is

New

Ongoing

In the past

Upcoming appointments

No upcoming appointments found

Visit Location

Select a location

Halcyon HealthCare Limited

Visit Type

Search for a visit type

Outpatient

Inpatient

Casualty/Emergency

Patient Category

Triage

Walk-in

Select a triage room

Triage Room 2 - OPD

Discard

Start visit

Visit started

Outpatient started successfully

3.

Manage Active visits

When a visit is started successfully, the client will be automatically queued in the Active visits Queue.

Located under;

Accounting Module-Active Visits Tab, Select Date Range accordingly.

Locate the client and **click** the 3 dots on the far right against the client's name to Manage the visit.

Active visit | Patient Bill | Bills Today | Claims | Pre-Authorization

Date range: Today

Active visits
Patients with an ongoing visit within the selected date range.

Search visits

Patient name	Visit type	Location	Start date
Unit Test One	Outpatient	Halcyon HealthCare Li...	Today, 15:07
M. [REDACTED]	Outpatient	Halcyon HealthCare Li...	Today, 15:02

Items per page: 10 | 1-2 of 2 items

Manage visit

4.

Confirm Payment Eligibility

- Check Patient is **not** exempted from payments
- Select **Insurance** as the payment method
- Select **SHA** as the Insurance Scheme
- Select SHA Benefit Package that matches the pre-authorization required.

Example: **SHA-16-SC-01-Renal Care services**
- Select SHA Interventions as applicable depending on the service the client is seeking
- Add the first chargeable service if required.

Manage visit

Mode of payment

Is patient exempted from payment?

☐ Yes
 ☒ No

Payment method

Insurance

Insurance scheme

SHA

Policy number

CR6898437491842-2

Active Schemes: PHC | SHIF ⓘ

Active

Is this an elective visit?

☒ No
 ☐ Yes

SHA Benefit Packages

Package

SHA-16-SC-01 — Renal Care Services

SHA Interventions

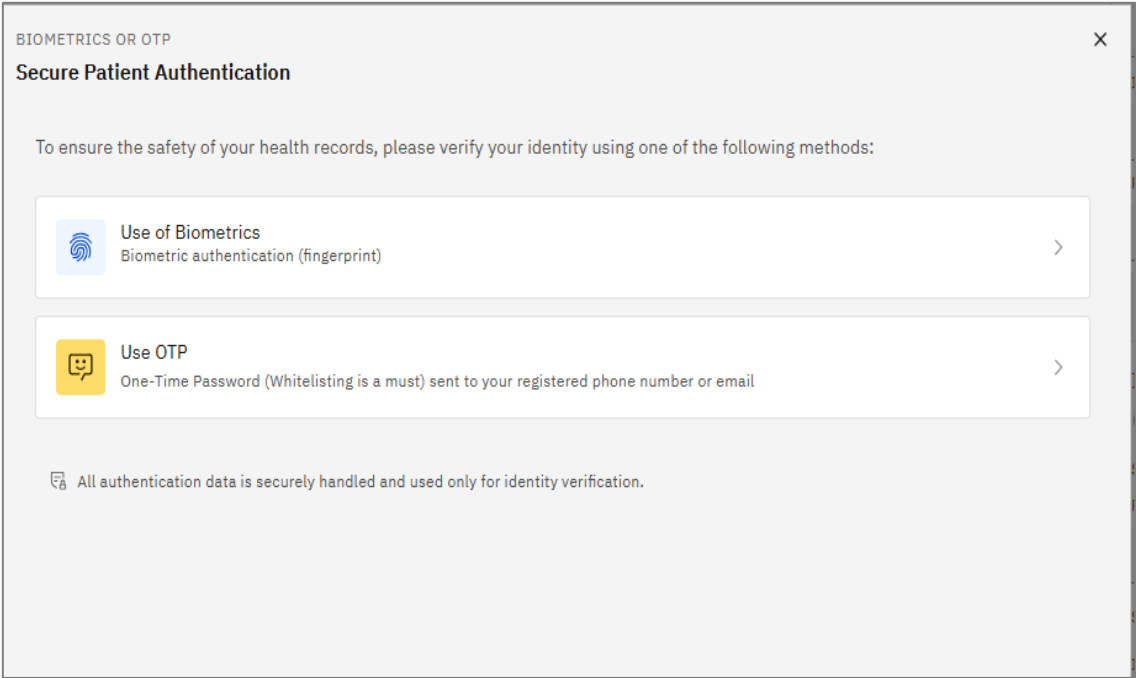
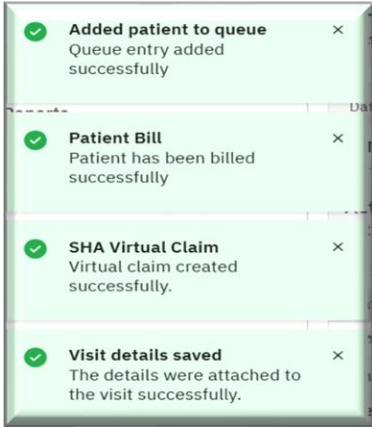
Interventions

Choose an intervention

Dialysis for acute kidney injury — Preauth required

Hemodiafiltration — Preauth required

Hemo dialysis — Preauth required

5.	Authenticate and Verify Client 1. Use Biometrics Verify the client's fingerprints against government verification records. 2. Send OTP Request for Client Whitelisting to use OTP., only if Biometrics cannot be used. NB:// <i>OTP whitelisting is requested with a reason.</i> Once the client is verified, the patient visit will be started.	
6.	System Confirmations 1. The client has been added to selected Queue for first service 2. A bill line item has been added to the patient bill 3. A SHA virtual Claim has been created successfully	

Pre-Authorization Process

1.

Type of Pre-Authorization Requests

1. Elective pre-authorization

- From the **Accounting Module**, access the Pre-Authorizations Tab.
- Click on Scheduled Tab
- Access **Create elective Preauth**

TaifaCare | Halcyon HealthCare Limited

Identifier: NONE Name: MARK ELIZABETH TORRES License: 2026-12-30 Valid License

Billing Home

Clocked in on 07 — Jul — 2026 · OPD Cash Point

Today, 13:21

Refresh Metric

Total Bills	Paid Bills	Pending Bills	Exempted Bills
KES 699.00	KES 0.00	KES 699.00	KES 0.00

Active visit Patient Bill Bills Today Claims **Pre-Authorization**

< Completed Rejected **Scheduled** >

Search patient or au... 17/07/2026 17/07/2026 **Create elective preauth** +

Scheduled Elective Pre-Authorizations

List of clients with scheduled pre-authorizations

Requesting an Elective Pre-authorization

- Search for a client

Create elective preauth

Search for a patient, select an elective intervention, then authorize with the patient's biometrics or an OTP. The elective preauth will appear in the Scheduled tab where you can submit it to SHA.

Search for a patient by ... Search

Cancel Authorize (OTP or biometrics) ?

- Identify Client
- Select applicable Benefit Package
- Add applicable intervention
- Authorize OTP or Biometrics

Create elective preauth

Search for a patient, select an elective intervention, then authorize with the patient's biometrics or an OTP. The elective preauth will appear in the Scheduled tab where you can submit it to SHA.

CCG

C [REDACTED] G [REDACTED]

♀ Female

[REDACTED] yrs · 15-Jun-1986 ·

OpenMRS ID: MGFN7T ·

Unique Patient Number: [REDACTED]

· National ID: [REDACTED]

National Unique patient identifier: [REDACTED]

· CR Number: CR [REDACTED]

Show more

Change patient

Benefit package

SHA-09-SC-01 – Medical Imaging

Medical Imaging

Intervention

Cardiac MRI · KES 11,000.00 – Elective pr...

Only elective interventions can be selected here. Use a normal visit for others.

Cardiac MRI - KES 11,000.00: Elective preauth required

Cancel

Authorize (OTP or biometrics)

?

2.

Non- Elective Pre-authorization

This is for a routine or emerging procedure.

1. Start a Patient Visit
2. Manage Visit to queue patient to Pending Pre-authorization.
3. Request for service required
 - Example: An Order for a Hemodialysis procedure.
 - Queue client to a procedure room
 - Save Order

Add Procedures order

[← Back to order basket](#)

Payment methods	Prices
Insurance	KES 10,650.00
Mobile Money	KES 10,650.00
Cash	KES 10,650.00

Test type

Hemodialysis

Operation category

Major

Priority

Emergency

Order reason

101/500

Acute pulmonary edema or fluid overload causing respiratory distress and not responding to diuretics.

Move to procedure queue →

Discard

Save order

✓

Order placed
 Placed order for Hemodialysis.

×

4. Download the Procedure Order

From the patient homepage-Orders, select the procedure requested for and print and save.

Procedures

Prescription

In-Patient

Orders

Results

Anaesthetic

Procedures Orders

Add Order +

Order No	Date Ordered	Order	Order reason	Priority	Order By	status	Actions
ORD-114...	Today, 14:...	Hemodial...		Emergency	admin - M...	--	

HALCYON HEALTHCARE LIMITED

PROCEDURE ORDER FORM

Patient Name:

Patient No:

Age:

Date

PreAuthorisation Test Test

MJYCTK

53

Today, 14:25

ORDER NO	DATE ORDERED	PROCEDURE	PRIORITY	ORDER BY
ORD-114460	Today, 14:21	Hemodialysis	STAT	admin - Mark Elizabeth Torres

PM-1784291141231-KQML2870B | Generated By: admin

Generated: Today, 14:25 | Facility: Halcyon HealthCare Limited

Cancel

Print

5. Request for the pre-authorization

- From accounting module, select Pre-authorization Tab
- Select Scheduled Tab to access clients queued for Pre-authorization from the **Manage visits Process**
- Click on Submit Preauth

The screenshot displays the KeHMIS Pre-authorization interface. On the left, a sidebar lists modules: Laboratory, Pharmacy, Accounting (selected), Reports, and Mortuary. The top navigation bar includes tabs: Active visit, Patient Bill, Bills Today, Claims, and Pre-Authorization (highlighted with a red box). Below the Pre-Authorization tab, there are sub-tabs: Completed (5), Rejected, and Scheduled (3, highlighted with a red box). A search bar and date range (01/07/2026 to 17/07/2026) are present, along with a 'Create elective preauth' button. A table lists preauth requests with columns: Patient, Auth Code, Intervention, Status, and Date Created. The table shows three entries, all with a status of 'DRAFT'. The first entry has Auth Code CKD02FQ988 and Intervention SHA-19-275 - Anterior c... The second entry has Auth Code URPH688J2A and Intervention SHA-19-453 - Revision o... The third entry has Auth Code EYDUWPNA3L and Intervention SHA-19-119 - Appendic... Below the table, there are '4 / 4 items' and pagination controls. The bottom section contains 'ELECTIVE PREAUTH DETAILS' for the selected entry (Auth Code URPH688J2A, Intervention Code SHA-19-453, Intervention name Hemodialysis, Service Type OUTPATIENT, Status DRAFT, Date Created 08-Jul-2026, 16:16, SHA status Active). To the right, 'REQUIRED DOCUMENTS' section states 'No specific documents listed - attach clinical notes and relevant lab result'. A blue notification box says 'Preauth not yet submitted. Submit an elective preauth to SHA for review.' At the bottom, there are two buttons: 'Submit Preauth' (green) and 'Cancel preauth' (red, highlighted with a red box).

Patient	Auth Code	Intervention	Status	Date Created
-	CKD02FQ988	SHA-19-275 - Anterior c...	DRAFT	09-Jul-2026, 07:49
-	URPH688J2A	SHA-19-453 - Revision o...	DRAFT	08-Jul-2026, 16:16
-	EYDUWPNA3L	SHA-19-119 - Appendic...	DRAFT	07-Jul-2026, 11:43

4 / 4 items

1 of 1 page

ELECTIVE PREAUTH DETAILS

Auth Code: URPH688J2A
 Intervention Code: SHA-19-453
 Intervention name: Hemodialysis
 Service Type: OUTPATIENT
 Status: DRAFT
 Date Created: 08-Jul-2026, 16:16
 SHA status: Active

REQUIRED DOCUMENTS

No specific documents listed - attach clinical notes and relevant lab result

Preauth not yet submitted
 Submit an elective preauth to SHA for review.

Submit Preauth **Cancel preauth**

Fill in the Preauthorization form

- Add a clinical indication
- Add the expected cost of the procedure in-line with the Tariff for the procedure from SHA.

Submit preauth

AUTH CODE	INTERVENTION
UKT379MBCR	SHA-16-001 – Hemo dialysis
TYPE	TARIFF (KES)
RENAL	KES 10,650.00

Service start *

Start time

17/07/2026

03:03

PM

Service end *

End time

18/07/2026

03:03

PM

Clinical indications

Acute pulmonary edema or fluid overload causing respiratory distress and not responding to diuretics.

Unit price (KES) *

10650

Amount requested from SHA for this intervention. Pre-filled with the published tariff.

Pre-populated from the Manage visit form when selecting SHA Package and associated intervention that requires a pre-authorization.

A summary of the clinical indications for the related intervention.

This is the total cost of the procedure.

- Define the frequency of sessions required
- The system will autopick the Date and time

Frequency of sessions

ONCE A WEEK

▼

Renal date

21/07/2026

Renal time

05:48

PM

▼

Co-insured

☐

 Yes

☒

 No

Attachments *

LAB RESULTS

IMAGING RESULT

MEDICAL REPORT

- Add all required attachments as per the pre-authorization type.

NB:// The attachments required are guided from the HIE.

Document type *

LAB RESULTS

Document title

Lab Results

Upload file *

PDF, PNG, JPG — max 10MB

Add file

Lab Report-Hemodialysis.pdf ×

Document type *

IMAGING RESULT

Document title

Imaging Result

Upload file *

PDF, PNG, JPG — max 10MB

Add file

Haemodialysis-ImageReport-Preauth.pdf ×

Submit Preauth request and await feedback

Client Notification

Doctor's Approval Request

NB:// Some pre-authorization requests will need peer review and approval by more than 1 doctor example Hip replacement request.

Discard

Submit preauth

Dear xxxxxxxx, please confirm the information provided is accurate and consent to the Hemo dialysis service(s) at Halcyon Healthcare Limited. Kindly note that making false statements under the Social Health Insurance Act 2023 is an offence. For help contact SHA on 147. Test message

A pre-authorization request of Ksh 10,650.00 for Renal services was submitted by HALCYON HEALTHCARE LIMITED on 13 Jul 26 1.22PM for xxxxx (Client ID CR68984H7491T42-G) visit. For help contact SHA on 147 Test message

3.

The pre-authorization request will move along different statuses.

Active visit

Patient Bill

Bills Today

Claims

Pre-Authorization

Pending5

Completed5

Rejected

Scheduled4

Search patient or au...

01/06/2026

21/07/2026

Patient	Auth Code	Intervention	Approved (KES)	Service Type	Approved On
ABDULHAKIM RAJAB IB...	LJ5TURESVX	SHA-16-001 — Hemo dia...	KES 10,650.00	OUTPATIENT	10-Jul-2026, 10:06

After the pre-authorization is approved, the client can now be offered the service.

1. Raise the bill for the procedure,
2. Manage the client through the Renal Management clinical form
3. Offer the Hemodialysis
4. Process payment
5. Close Bill and Submit the claim form.

Active visit	Patient Bill	Bills Today	Claims	Pre-Authorization	
Pending 5	Completed 5	Rejected	Scheduled 4		
Search patient or au... 01/06/2026 21/07/2026					
Patient	Auth Code	Intervention	Approved (KES)	Service Type	Approved On
ABDULHAKIM RAJAB IB...	LJ5TURESVX	SHA-16-001 — Hemo dia...	KES 10,650.00	OUTPATIENT	10-Jul-2026, 10:06

Active visit	Patient Bill	Bills Today	Claims	Pre-Authorization	
Pending 5	Completed 5	Rejected	Scheduled 4		
Search patient or au... 01/06/2026 21/07/2026					
Patient	Auth Code	Intervention	Approved (KES)	Service Type	Approved On
[REDACTED]	LJ5TURESVX	SHA-16-001 — Hemo dia...	KES 10,650.00	OUTPATIENT	10-Jul-2026, 10:06

PREAUTH DETAILS

Auth Code: LJ5TURESVX

Intervention Code: SHA-16-001

Intervention name: Hemo dialysis

Preauth Type: RENAL

Service Type: OUTPATIENT

Filter by Status: **FINALISED**

Requested on: 10-Jul-2026, 10:15

Responded on: 10-Jul-2026, 10:06

Approved (KES): KES 10650

CLINICAL DETAILS

Doctors: 2

A8691 Dr JOHN WAIHAKA MUTHEE Remove

A8691 Dr JOHN WAIHAKA MUTHEE Remove

SUBMITTED DOCUMENTS

IMAGING_RESULT View

MEDICAL_REPORT View

LAB_RESULTS View

VISIT INFO

Visit Type: Outpatient

Visit date: 10-Jul-2026, 09:47

Auth status: AUTHORIZED

Cancel preauth

THE END