

SOP: TaifaCare e-Claims processing- Maternity Delivery Workflow

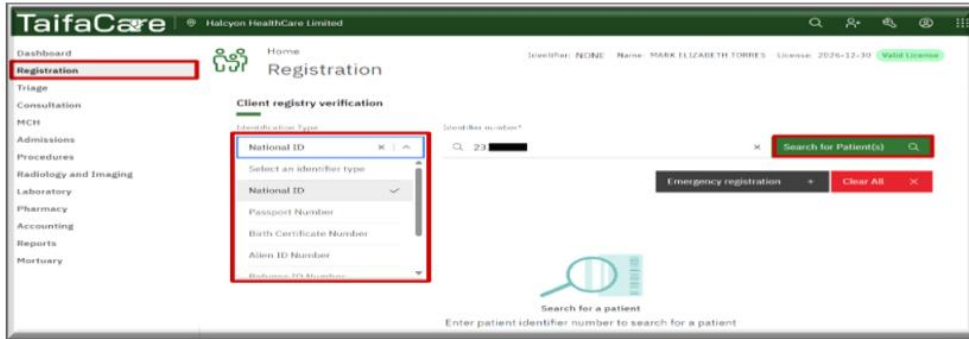
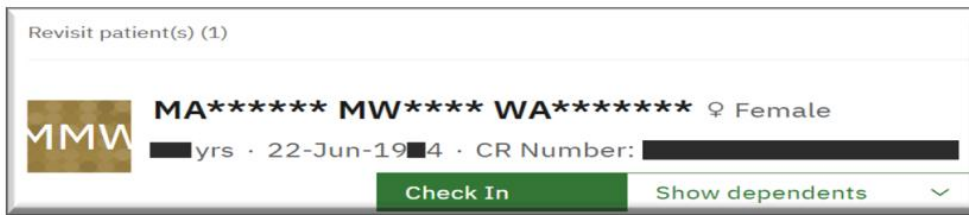
(Last update: July 2026)

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
DEPENDANCIES:	Facility HIE configuration, Adding clinical charges, Installation of Health ID and Staff training.
SUMMARY: The process e-claim feature in TaifaCare allows facilities to comfortably process insurance claims and share captured information in 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 Central Finance Unit for insurance payments.

It should be noted that for e-claims to be achieved from TaifaCare, 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.

This user guide provides a clear and practical overview of the Maternity services workflow, it outlines the essential steps and documentation requirements needed to ensure accurate, timely and compliant claims processing.

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 and select Outpatient
- 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.

The screenshot shows the 'Active visit' tab selected in the top navigation bar. Below the navigation bar, there is a 'Date range' dropdown menu set to 'Today'. The main section is titled 'Active visits' with the subtitle 'Patients with an ongoing visit within the selected date range.' Below this is a search bar labeled 'Search visits'. A table displays the active visits with columns: Patient name, Visit type, Location, and Start date. The table contains two rows. The second row, for a client named 'M. [REDACTED]', is highlighted with a red box. To the right of this row is a vertical ellipsis (three dots) icon. At the bottom right of the table, there is a 'Manage visit' button, also highlighted with a red box. The bottom of the interface shows 'Items per page: 10' and '1-2 of 2 items'.

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 as **SHA-8-SC-02-Maternity, Neonatal and Child health services**
- Select SHA Interventions as
 - **Cesarean Section**
 - **Virginal delivery**

NB:// *Both interventions do not require pre-authorization*

- Add the first chargeable service as applicable.

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-08-SC-02 — Maternity, Neonatal and Child health services

SHA Interventions

Interventions

Choose an intervention

Cesarean Section — No preauth needed

Vaginal Delivery — No preauth needed

Cancel

Save & Close ⓘ

3.

Authenticate and Verify Client

1. Use Biometrics

Verify the client's fingerprints against government verification records.

Once the OTP is verified, the patient visit will be started.

BIOMETRICS OR OTP
Secure Patient Authentication

To ensure the safety of your health records, please verify your identity using one of the following methods:



Use of Biometrics
Biometric authentication (fingerprint)



Use OTP
One-Time Password (Whitelisting is a must) sent to your registered phone number or email

 All authentication data is securely handled and used only for identity verification.

Clinical Workflow

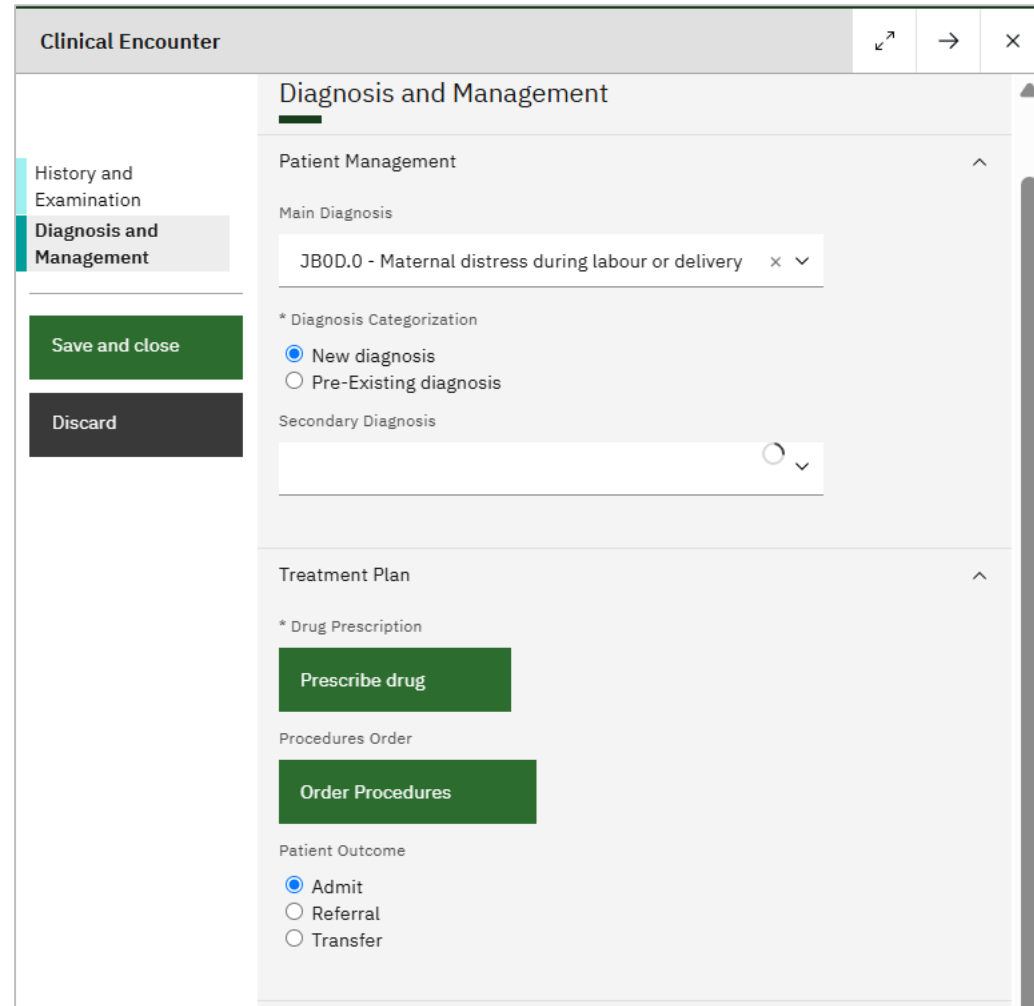
No	Task Description	Screenshot								
4.	1. Triage Client From MCH Triage queue, pick a client and call for service. Document the Triage form and queue client for Clinical services	Triage Triage Save and close Discard Triage Visit Details * Date: 02/07/2026 * Provider: admin - Mark Elizabeth Torres * Location: Halcyon HealthCare Limited Complaints and History of complaints * Patient having complaint(s) today? Yes No Presenting complaints Complaint: Abdominal pain Duration (Days): 1 Onset Status: Gradual Latest Vitals <table><tr><td>Temp °C 38°C</td><td>Pulse (bpm) 94 bpm</td><td>Blood Pressure (mmHg) 120/76 mmHg</td><td>Resp. Rate 18 br/min</td></tr><tr><td>SpO₂ 95 %</td><td>Weight 62 kg</td><td>Height 161 cm</td><td>BMI 23.9 kg/m²</td></tr></table>	Temp °C 38°C	Pulse (bpm) 94 bpm	Blood Pressure (mmHg) 120/76 mmHg	Resp. Rate 18 br/min	SpO ₂ 95 %	Weight 62 kg	Height 161 cm	BMI 23.9 kg/m²
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2. Clinical Review

Access the Clinical encounter form and fill in the Key areas that must be completed for the processing claims:

- Document presenting complaints as highlighted from Patient History section.
- Document Clinical Impression from History and Examination Section.
- Document Main Diagnosis from the Diagnosis and Management section.
- Admit client to Labour ward.

NB: The Medical Officer or Clinical Officer documenting the Clinical management form should have a valid License, since their name will appear in the claim form.



The screenshot displays the 'Clinical Encounter' form with the 'Diagnosis and Management' section active. The left sidebar shows 'History and Examination' and 'Diagnosis and Management' tabs, with 'Diagnosis and Management' selected. Below the tabs are 'Save and close' and 'Discard' buttons. The main content area is titled 'Diagnosis and Management' and includes the following sections:

- Patient Management:**
 - Main Diagnosis:** A dropdown menu showing 'JB0D.0 - Maternal distress during labour or delivery' with a close (x) and expand (v) icon.
 - * Diagnosis Categorization:**
 - ☒ New diagnosis
 - ☐ Pre-Existing diagnosis
 - Secondary Diagnosis:** A dropdown menu with a loading spinner and a close (x) icon.
- Treatment Plan:**
 - * Drug Prescription:** A green button labeled 'Prescribe drug'.
 - Procedures Order:** A green button labeled 'Order Procedures'.
 - Patient Outcome:**
 - ☒ Admit
 - ☐ Referral
 - ☐ Transfer

3. Admission to labor ward

A clinician will request admission to the labour ward.

The request will queue the client under Awaiting admissions queue.

Once a client is admitted and assigned a bed, further Clinical review can be documented in the system as required.

Clinical Form

Adding to: **Outpatient**

Current active visit · Halcyon HealthCare Limited

Admission Request

Save and close

Discard

Admission Request

Ward Details

* Inpatient patient disposition

☒ Admit to hospital

* Admit To Location

Labour ward

Ward Patients

List

Card

Awaiting Admission

Admitted

Discharge In

Discharged

Search

Date Queued	ID Number	Name	Gender	Age	Bed Number	Duration on Ward	Action
Today, 17:01	MJXY4F				--	0	Admit elsewhere Admit patient Cancel

4. Maternity Clinical management forms

A user will access the inpatient clinical forms from the client home page, inpatient module.

Sample Inpatient Clinical forms that can be filled for a client

Date & time	Visit type	Encounter type	Form name
01-Jul-2026, 18:27	Inpatient	Admission	In-Patient Admission Form
01-Jul-2026, 18:26	Inpatient	Consultation	Clinical Encounter
01-Jul-2026, 12:25	Inpatient	IPD Discharge	Inpatient Discharge Clinical Form
01-Jul-2026, 12:15	Inpatient	Doctor's Note	Doctor's Note Clinical Form
01-Jul-2026, 12:08	Inpatient	Transfer	In-Patient Admission Form
01-Jul-2026, 12:06	Inpatient	MCH Mother Consultation	Delivery
01-Jul-2026, 11:49	Inpatient	Pre-Operation Checklist	Pre-Operation Checklist Clinical ...
01-Jul-2026, 11:30	Inpatient	MCH Inpatient	Maternity Inpatient
01-Jul-2026, 11:25	Inpatient	Consultation	Clinical Encounter
01-Jul-2026, 10:46	Inpatient	Triage	Triage

5. Decision guide for a cesarean section delivery

By filling in the Labor care guide

This will support the decision on the delivery mode, as either **SVD** or **CS**.

Shared Decision Making	Assessment	Companion N: encourage Pain relief N: she declined
	Plan	Prepare for emergency CS
	Action	Emergency Caesarean section Prescribed

Ordering for a Delivery Procedure as applicable.

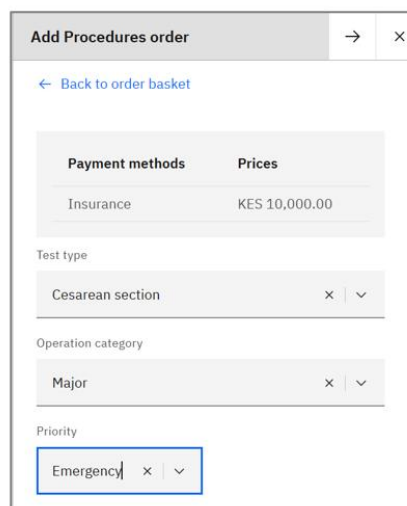
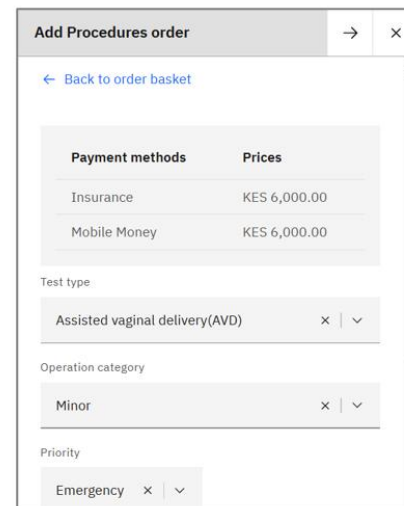
- Normal delivery
- cesarean Procedure

Note: Ensure all Investigation orders have been added as clinical charge items and have prices attached for each service. Raised orders will generate bills that can be accessed from the billing module.

Refer to the Lab Order SOP, Drug Orders SOP and Procedures Orders SOP for a detailed explanation on raising orders in TaifaCare-(K) system.

- Deliver the baby through the selected method and fill all applicable forms.
- Add all patient bill items for services and commodities issued to the client and the baby.
- Fill in the **Delivery form** and **Doctor's Notes** and **Discharge** the patient from Labour care and fill in the discharge summary form.

The system will queue the client to Discharge- in until the inpatient bill is cleared.

Recommended Inpatient forms to Fill by Delivery Mode

No	Normal Vaginal Delivery	Cesarean Section Delivery
1	Maternity Inpatient form	Maternity Inpatient form
2	Labour Care Guide	Labour Care Guide
3	Initial Cardex	Initial Cardex
4	Cardex Nursing Plan	Cardex Nursing Plan
5	Treatment sheet	Treatment sheet
6	Fluids intake	Fluids intake
7	Delivery form	Pre-anesthesia checklist
8	Doctor's Follow-up Note	Surgical safety checklist
9	Discharge Summary	Delivery form
10		Post Operative form
11		IPD procedure form
12		Newborn Unit Admission
13		Doctor's Follow-up Note
14		Discharge Summary

6. Process the Client Bill

Click on the **Accounting Module** to access the services and items billed for the client. Click on the client's name to access the bill processing section.

NB: All applicable clinical charges should have a price in the system first.

Each intervention has a different Tariff.

Select the items to be billed by checking the Checkboxes against each Line item.

Click Payment Link under Total amount bill and select **Insurance payment** mode

Select **SHA** and applicable intervention. Process the payment, save and print the receipt for the client.

Line items

Items to be billed

☒ 1 Adult Co... 0191-7 PAID Insurance 1 299 299
 ☒ 2 Normal D... 0191-7 PAID Insurance 1 10000 10000
 ☒ 3 Adult Co... 0191-7 PAID Mobile M... 1 145 145
 ☒ 4 Ceasaria... 0191-7 PENDING Insurance 1 25000 25000
 ☒ 5 Cotton W... 0191-7 PENDING Mobile M... 1 280 280
 ☒ 6 Paraceta... 0191-7 PENDING Insurance 1 280 280
 ☒ 7 Amoxicill... 0191-7 PENDING Insurance 20 2 40

Total Amount

KES 36,044.00

Payments amount

KES 10,444.00

Amount due

KES 25,600.00

Payments →

8. Close Client Bill

From Accounting module, Close the Patient bill to activate the Submit Claims button.

TT

Test Testing ♂ Male
 26 yrs · 31-May-2000 ·

Actions ⋮

Show more ▾

Invoice Summary

Print

Close Bill ×

9.

Client Claim form page:

- 1- Claim Status at EMR
- 2- Claims status at Payer
- 3- Review the claim Summary
- 4- Review added SHA interventions
- 5- Add required attachments, generate from the system or upload.
- 6- Confirm Chargeable Bill items
- 7- Confirm Diagnosis
- 8- Add a Doctor with a valid license to the claim

Submit claims to the payer after confirming all the information reviewed is okay.

Claims					
Date Created	Authorization code	Service Type	Invoice Number	Claim status	Payer
29 - Jun - 2026, 18:25	E6BTKQHALH	CAPITATION	INV/13545/72709	DRAFT	Not yet submitted
					Submit claim

TaifaCare

Halcyn HealthCare Limited

MMW

42 yrs - 22-Jun-1984 - CR Number:

Female

Actions

Show more

Pending (4)

Sent (2)

Pending resubmission (0)

Closed (3)

Paid (2)

Claims

Date Created	Authorization code	Service Type	Invoice Number	Claim status	Payer
03 - Jul - 2026, 09:47	FPKZ7CHGGZ	INPATIENT	0219-6	SUBMITTED	MEDICAL REVIEW

Claim Summary

Payer

Social Health Authority

Scheme: SHIF - Social Health Insurance Fund

Member Number

CR6898437491842-2

Service Type

INPATIENT

Use type

claim

Start date

27-Feb-2025

End date

27-Feb-2025

Invoice Number

0219-6

Total billed

KES 24,819.00

Interventions (1)

SHA-08-006

Cesarean Section

CASE BASED

Tariff (KES): KES 30,000.00

Attachments

Upload attachments

Generate documents

BIRTH NOTIFICATION

DISCHARGE SUMMARY

FINAL BILL

CLAIM FORM

THEATRE NOTES

DISCHARGE SUMMARY

FINAL BILL

CLAIM FORM

View

DISCHARGE_SUMMARY

View

FINAL_BILL

View

CLAIM_FORM

View

THEATRE_NOTES

View

BIRTH_NOTIFICATION

View

Bill lines (1)

Adult Consultation

SHA-08-006

Cesarean Section

DIAGNOSES (1)

JAB0_Y

Maternal care related to other specified multiple gesta

Doctors (1)

Dr JOHN WAITHAKA MUTHEE

10.	Claims status and feedback from the payer Send OTP to the client to validate the claim form, add OTP to submit the claim. Once submitted the Claim will move to the Sent tab, The Claims and Payer status will change according to the claims review processes, changing the status from Submitted to Approved or Rejected with reasons. Expand to view payer activities until the final Claim status is given and end a client visit.	Payer activity Notes from SHA (2) - - MEDICAL_REVIEW adapter1 Userr (adapter@provider-uat.sha.go.ke) - Loaded to payer - AUTOMATIC_CHECKS_DONE adapter1 Userr (adapter@provider-uat.sha.go.ke) Timeline (5) 03-Jul-2026, 11:27 SUBMITTED_PAYER → MEDICAL_REVIEW 03-Jul-2026, 11:22 SUBMITTED_PAYER → AUTOMATIC_CHECKS_DONE 03-Jul-2026, 11:22 AUTOMATIC_CHECKS_DONE → SUBMITTED_PAYER 03-Jul-2026, 11:22 SUBMITTED_PROVIDER → AUTOMATIC_CHECKS_DONE 03-Jul-2026, 11:21 DRAFT_PROVIDER → SUBMITTED_PROVIDER
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THE END