



Kareo Managed Billing Required Documents

Returned	Required Document
	TAF Form
	W9 Form
	Bank Letter w/ Full Account Number
	Sample EOBs (Medicare, Medicaid, Commercial payers)
	List of CPT Codes & Fees
	Example of Paper Superbill
If Applicable	
	Patient Intake Form
	Financial Policy Form
	Non-physician Provider Setup Form
	List of Referring Physicians (applies to any specialist)
	WebPT EHR 3rd Party Access Form