



2027 CERTIFICATION PREPARATION CHECKLIST



Be Prepared. Stay Compliant. Start Strong.

Use this checklist to ensure you are ready for AHIP and carrier certification season.

Completing these steps early will help you avoid delays and be Ready-to-Sell on day one.



1. VERIFY YOUR LICENSE(S)

Confirm your health insurance license(s) are active and in good standing in all required states.



2. REVIEW YOUR E&O COVERAGE

Make sure your Errors & Omissions insurance is current and meets carrier requirements.



3. CONFIRM YOUR NPN & PORTAL ACCESS

Verify your NPN is active and you can log in to AHIP and carrier portals.



4. GATHER CONTRACTING INFORMATION

Have your personal and business information ready for appointments and contracting.



5. SET ASIDE DEDICATED TIME

Block time on your calendar to complete AHIP and carrier certifications without interruptions.



6. SAVE IMPORTANT LINKS & CREDENTIALS

Bookmark key websites and keep your login information secure and accessible.



7. REVIEW CARRIER REQUIREMENTS

Each carrier has different requirements—review early so you know what to expect.



8. COMPLETE AHIP TRAINING

Finish AHIP training first. Many carriers require you to have it completed before certifying.



9. CHECK STATE SPECIFIC DEADLINES

Be aware of state-specific deadlines and timelines for certification and contracting.



10. SIGN UP FOR IMPORTANT UPDATES

Opt in to carrier and TBGA communications so you don't miss important announcements.



11. PLAN FOR NEW CARRIER APPOINTMENTS

If you plan to add new carriers, start the appointment process early to allow time for approval.



12. CONFIRM READY-TO-SELL STATUS

Verify that all certifications are showing as "Ready-to-Sell" in carrier portals.



13. REVIEW CARRIER PRODUCT PORTFOLIOS

Familiarize yourself with the products offered so you can better serve your clients.



14. COMPLETE PRODUCT TRAINING (IF AVAILABLE)

Take advantage of carrier product training to deepen your knowledge and stay compliant.



15. CHECK EMAIL & SPAM/JUNK FOLDERS

Important certification emails may come from carriers or AHIP—make sure you see them.



16. CONNECT WITH YOUR UPLINE/BDM

Stay in close contact with your TBGA upline or BDM for updates, support, and guidance.



17. VERIFY APPOINTMENT STATUS

Ensure your carrier appointments are approved and active in each state.



18. ORGANIZE YOUR CERTIFICATION DOCUMENTS

Keep copies of completion certificates and important documents for your records.



19. ASK QUESTIONS EARLY

If you're unsure about any step, ask early to prevent delays or surprises.



20. COMMIT TO AN EARLY START

The earlier you complete certifications, the more time you have to sell and serve your clients.

ADDITIONAL TIPS FOR SUCCESS

- ✓ Start early and avoid the last-minute rush.
- ✓ Double-check all information for accuracy.
- ✓ Keep usernames and passwords in a secure location.
- ✓ Stay organized and track your progress.
- ✓ Don't wait—certify early and be Ready-to-Sell!



GET CERTIFIED EARLY. STAY READY. GROW YOUR BUSINESS.

Completing AHIP and carrier certifications early positions you for a successful AEP 2027.

Visit our **Certifications Hub** for important dates, links, and updates:

thebedrockgroupadvisors.com/certificationshub

