



2027 Medicare Certification Tracker

A simple worksheet to help Medicare agents track AHIP and carrier certifications.

Stay organized before AEP. Know what is done, what is pending, and what needs follow-up.

How to use this tracker

- 1 Enter your agent name, NPN, and the plan year at the top of the tracker.
- 2 Add each carrier certification you need to complete.
- 3 Update the status as you move from not started, to in progress, to completed.
- 4 Use the notes column for portal reminders, certification quirks, or follow-up items.
- 5 Save a copy and update it regularly throughout certification season.

Agent reminder

This tracker is for organization only. Always follow current CMS rules, carrier requirements, upline guidance, and the certification instructions provided by each carrier or training platform.

KundPro helps Medicare agents organize clients, policies, commissions, follow-ups, and annual tasks.



Certification Notes

Use this page for carrier-specific reminders, follow-ups, or training notes.

Note 1

Note 2

Note 3

Note 4

Note 5

Note 6

Note 7

Note 8

KundPro reminder

Certification tracking is one part of staying organized. KundPro helps agents manage the bigger workflow: clients, policies, commissions, tasks, notes, and follow-ups.