

# PSD2/PSA Technical Preparation Checklist

Before you record your PSD2 or PSA video, you must review this list and be sure that you understand the following requirements as outlined in the [PSD/PSA Guidebook](#):

## VIDEO PREPARATION

- My client meets the established Practice Client criteria:** My client may be someone I know well or interact with regularly (acquaintance, distant family member, neighbor, colleague, or coworker), but may not be a close friend, immediate family member, or someone with a background in coaching (coach or past/present student of a coach training program). My client must be 19 years of age or older.
- Videos can be no longer than 20 minutes (PSD2) or 30 minutes (PSA):** I have done several practice sessions already and feel confident that I can complete a coaching session in the allotted time. *Note: a complete coaching session means engaging to closing. The session cannot be an excerpt and the recording cannot be edited.*
- Videos must be in gallery view:** I understand that I must use Zoom on a Mac or Windows computer because phones, tablets, and Chromebooks cannot record in Gallery view. I have done a test recording to confirm that I can see my video and my client's video at the same time (side by side).
- Videos must have clear audio:** Both my client and I have selected a location that has a strong internet connection. I have done a test recording and can clearly hear both my voice and my client's voice.

## TRANSCRIPT PREPARATION

- Transcripts must be ordered 1 week in advance of the PSD2/PSA submission deadline:** I must order my transcript from TranscribeMe at least one week before the PSD2/PSA deadline so that my transcript is available in time to submit with the rest of my PSD2/PSA materials.
- Transcripts must have timestamps and speaker IDs:** When I order the transcript from TranscribeMe, I will select "Included, 2-3 Speakers" under "Speaker IDs and Timestamps."

- Transcripts must be accurate:** When I order my transcript from TranscribeMe, I will choose the “Standard” transcription option or higher.

#### WAIVER PREPARATION

- Privacy must be discussed:** I have discussed the need for a waiver with my client and explained how the video will be used.
- Waiver must be signed:** I have provided the waiver to my client and they have signed it and given it back to me.