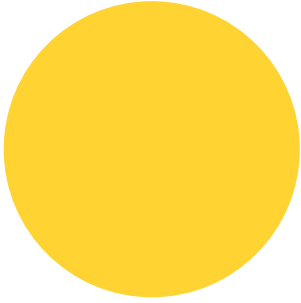
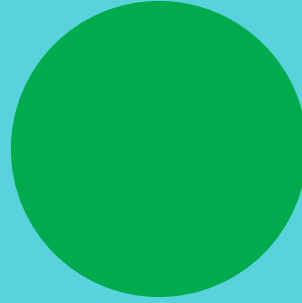


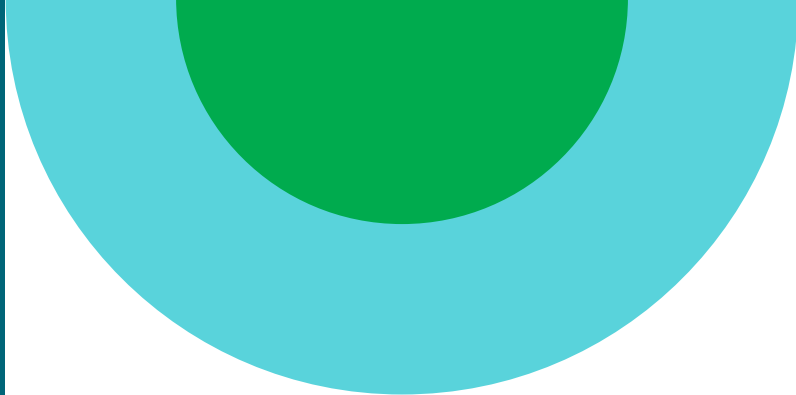
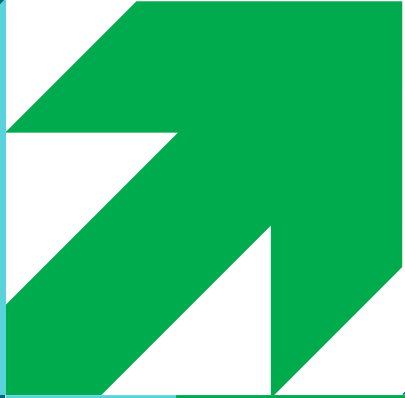
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Complete your
MAAT application



HOW TO...



How to apply

Your online MAAT application is split into two parts. It typically takes just an hour or two to complete. You can submit each section at a time that suits you, and you can save your progress as you go.

Work experience

- ✓ Submit up to five personal competences
- ✓ Submit one technical competency

Your details and declaration

- ✓ Answer suitability questions
 - ✓ Read and submit the declaration
-





Submit your work experience

This section asks you to explain how you've put your personal and technical skills into practice. We call these skills 'competences'.

Top tips

- ✓ Read the criteria, tips and example answers to guide you.
- ✓ Write in sentences or bullet points – just make sure you reflect on the criteria listed.
- ✓ Focus on your recent experience where possible.





Submit your work experience

Personal effectiveness competences

We want to know how you've put these key skills into practice.

Behaving ethically*

Commitment to Continuing Professional Development (CPD)

Communication skills*

Managing time and workload

Teamwork

Top tips

- ✓ You can give examples from any job you've held – whether or not the role was finance-related. Voluntary placements and temporary work can also count.
- ✓ You can use a different workplace for each area, or use the same one for all competences.
- ✓ You don't have to complete each competency in one go. You can save your comments and come back to them another time.
- ✓ When you're happy with each of your examples, it's time to submit them to us. We'll check each of your examples and email you to confirm if they have been approved.
- ✓ You can also submit this section over the phone. Give our team a call on **+44 (0)20 3735 2434**. Lines are open 09.00–17.00 Monday to Friday (UK time).

*If you have registered for or completed AQ2016, you don't need to submit anything under these competences.



Submit your work experience

1 Behaving ethically

If you have registered for or completed AQ2016, you don't need to submit anything in this section – move straight on to the next competency.

Criteria

We need to know that you:

- > ensure confidentiality of information
- > demonstrate professional integrity
- > can identify and deal with ethical issues.

Tips

Here are some areas to think about when completing this section.

- ✓ Do you deal with confidential information? How do you ensure it's kept confidential?
- ✓ Can you demonstrate how you behave professionally and have integrity?
- ✓ Have you been involved with an ethical issue at work that you have dealt with successfully?

Example answer: Behaving ethically

- *In my role I make sure all spreadsheets containing personal information are password protected so that only authorised individuals have access.*
- *Some data is sent to third parties so I ensure references to our customers are removed.*
- *I am responsible for reviewing various legal documents and therefore have to regularly refer queries to senior managers when there are conditions that I am not familiar with.*
- *I am aware of the relevant legislation and regulations, for example the need to comply with the Money Laundering Regulations 2017. I am involved in customer due diligence and I know that I am obliged to report any suspicious activity and any large transactions to our money laundering reporting officer.*





Submit your work experience

2 Commitment to Continuing Professional Development (CPD)

Criteria

We need to know that you:

- > set your own personal and professional development objectives
- > identify your learning gaps using AAT's CPD cycle or other frameworks
- > participate in CPD activities.

Tips

Here are some areas to think about when completing this section.

- ✓ What training gaps or learning needs do you have? What are your career aspirations?
- ✓ Do you have appraisals or regular meetings with your manager, where you discuss your training needs?
- ✓ What training have you undertaken recently to help you in your role? This can be in-house through your employer, and can include things like job shadowing.
- ✓ Do you use any AAT CPD resources? If so, what are they?

Example answer: Commitment to CPD

- *I have an appraisal every six months. I complete my own appraisal form regularly to make sure as much information goes into it as possible.*
- *I set some of my own objectives and discuss with my manager how they can be achieved.*
- *I regularly look at the courses and other learning opportunities available in our company and enrol on them. I have undertaken several courses at work to further my development such as Effective Writing Skills, and Excel Advanced and Intermediate.*
- *I constantly want to better myself and my knowledge. I have job shadowed colleagues in other departments in order to develop a greater understanding of other roles in my company.*
- *Since completing my qualification, I have continued to use AAT's e-learning to stay up to date.*
- *I read newsletters for articles and updates. I listen to a podcast or webinar at least once a month, and have attended a branch network event on tax, and found it useful talking to other members and students.*



Submit your work experience

3 Communication skills

If you have registered for or completed AQ2016, you don't need to submit anything in this section – move straight on to the next competency.

Criteria

We need to know that you:

- > deliver information to clients and colleagues clearly and logically
- > can choose an appropriate communication method to deliver information
- > communicate effectively without errors and avoiding jargon.

Tips

Here are some areas to think about when completing this section.

- ✓ How do you communicate with colleagues and what do you discuss? Do you have team meetings, do you give presentations, or do you communicate via email or any other written or verbal forms?
- ✓ How do you communicate with clients and what do you discuss? Do you speak with them over the phone, or in person? How do you make sure they understand what you are communicating?

Example answer: Communication skills

- *I regularly participate in the Finance Department meetings. I sometimes prepare the agenda and chair the meetings. I also add agenda items to discuss any issues or queries from clients.*
- *I listen to my colleagues in order to create accurate minutes for distribution to the team. I ask questions relating to other colleagues' discussion points and seek clarification if I'm not clear about something.*
- *On a daily basis I produce file notes, emails and letters to clients, either updating them on their accounts or asking them for information so work can be done on their accounts.*



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Submit your work experience

4 Managing time and workload

Criteria

We need to know that you:

- > can use time management skills and tools to organise and prioritise workload
- > can set and meet deadlines
- > can communicate progress on tasks and assignments to colleagues.

Tips

Here are some areas to think about when completing this section.

- ✓ How do you organise and prioritise your workload and ensure you meet deadlines?
- ✓ Do you use calendars or to-do lists, and how often do you update them?
- ✓ How do you keep your colleagues and manager updated about your progress?

Example answer: Managing time and workload

- *I make a list every Friday of the things that I want to achieve the following week.*
- *A lot of what I do happens cyclically (every month/week/year), so I slot the recurring tasks in my calendar in advance. It gives me an idea of how much time I have left to do other tasks.*
- *I am able to make and keep deadlines. I demonstrate this by immediately writing down any tasks I have been given verbally and scheduling them in to my diary when appropriate.*
- *In regards to bigger projects and tasks, I regularly update my manager on progress and we discuss any new actions that need to be taken together.*





Submit your work experience

5 Teamwork

Criteria

We need to know that you:

- > share knowledge and information with colleagues
- > appreciate the needs and workload of colleagues
- > help and support colleagues to achieve common goals.

Tips

Here are some areas to think about when completing this section.

- ✓ Do you work as part of a team, and how do you share your information with them?
- ✓ Do you ever work on projects or tasks together?
- ✓ Do you train other staff members, such as those junior to you, or new members of your team?

Example answer: Teamwork

- *I work as part of a large accounts team and we always communicate and help one another on various issues. If one member of staff finds out important information, they share it with everyone else and we often have an open discussion on the topic.*
- *I often provide help to our junior member of staff and administrative assistant, mostly in bookkeeping or when using particular software.*
- *I created a more effective process for logging complaints, which shortened the response time. Everyone in my team now follows this process.*





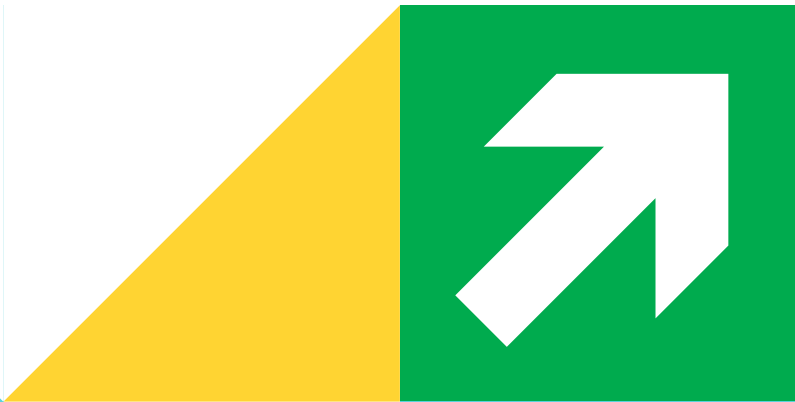
Submit your work experience

Technical competences

In this section, you need to tell us how you've put a technical finance or accounting skill into practice. You can choose any area that you have at least six months' experience in, such as financial accounting, management accounting, payroll, credit control or tax.

Top tips

- ✓ Take a look at the example answers on the next two pages to help you complete this section.
- ✓ You don't have to complete this section in one go. You can save your comments and come back to it another time.





Submit your work experience

Here are some examples of how you can complete this section.

Financial accounting

As the Accounts Assistant I assist in the preparation of the year end accounts for the two limited companies in the group.

- *I prepare the trial balance to its draft stage.*
- *I code and check invoices, pay suppliers, check and reconcile supplier statements.*
- *I deal with any purchase enquiries and process staff expenses.*

Management accounting

As a Trainee Accountant my role involves:

- *preparing the monthly management pack under the supervision of the Financial Controller*
- *preparing the sales reports analysed by services, departments and countries and compared against the sales forecast*
- *preparing the comparison reports between budgeted costs against actual costs and expenses incurred.*

Payroll

- *I follow the company policy regarding payroll and assist the company to comply with its legal requirements in respect of Pay-As-You-Earn (PAYE) using Real Time Information (RTI).*
- *I run the payroll on a monthly basis. This includes entering information for new employees and verifying their National Insurance numbers, adding the overtime for the previous month, updating the tax codes as advised by HMRC and making any changes to the various deductions.*
- *I make the necessary adjustments for the Statutory Sick Pay and Statutory Maternity Leave.*
- *I arrange for payment of employees' net pay directly into their bank accounts, as well as payment of income tax and national Insurance Contributions to HMRC on a timely basis.*
- *I prepare and submit P9Ds, P11Ds and year end tasks.*



Submit your work experience

Here are some examples of how you can complete this section.

Credit control

- *As the Credit Controller I follow the company's policies regarding providing goods and services 'on credit'. For new customers, I apply the company's standard policy of supplying goods/ services on credit. If the customer requests a high level of credit then I carry out background checks (if it is a company). If it's an individual I would check with a credit ratings agency.*
- *I work closely with the Sales Department, mainly to make sure a 'stop' is added or removed from a customer's account.*
- *On a regular basis I use the Aged Debtors List to chase outstanding debts. I report to the Financial Controller on a monthly basis regarding the level of outstanding debts and whether debts that are long overdue need to be passed to a debt collection agency, or legal action taken in line with the company policy.*

Tax

I am part of a well-established team specialising in VAT that focuses on FTSE 100 clients. My key duties are:

- *providing high quality tax services to clients*
- *managing VAT compliance for insolvent businesses*
- *interacting with HMRC, Insolvency team and other VAT teams*
- *preparing and delivering VAT training to more junior team members.*

Audit

As an Audit Assistant at a small firm of Auditors, my role involves:

- *assisting in carrying out quality audit and other assurance services to clients in different industry sectors*
- *assisting in obtaining all necessary audit working papers and documentation including researching and documenting facts and findings*
- *identifying and communicate accounting and auditing matters to managers and partners*
- *identifying performance improvement opportunities*
- *interacting with clients to help ensure that the information flow from the client to the audit team is efficient*
- *using the firm's audit tools.*



Complete your declaration

This section should only take five minutes to complete.

You'll need to answer a few questions about your contact preferences, confirm that you're eligible to become a MAAT, and agree to the MAAT declaration.

Top tip



For guidance on AAT's fit and proper regulations and policy framework visit aat.org.uk/about-aat/professional-standards/fit-and-proper-requirements



After you've completed your application

Once you've completed your application, you'll need to pay a one-off admission fee but won't have to pay your new membership fee until the next time you're due to renew.

And don't forget:

- if you apply within three months of completing the AAT Professional Diploma in Accounting qualification your admission fee will be reduced.
- if you apply before completing the AAT Professional Diploma in Accounting qualification, you won't be asked to pay this fee. This section on your application will be shown in grey.

If you don't have a current AAT membership, you'll need to pay your annual MAAT membership fee now too.

Top tip

- ✓ Set a reminder to submit your application as soon as possible – apply within three months of completing the AAT Professional Diploma in Accounting qualification for a discount on your fee.



Start your MAAT application

Gain recognition as a qualified and engaged member of the finance community and continue to develop your skills and knowledge by becoming a MAAT.

If you're ready why not start your application?



Contact us

Need help with your MAAT application, or have a question?
We're here to help.

Give our team a call on **+44 (0)20 3735 2434**.

Our telephone lines are open Monday to Friday,
09.00 to 17.00 UK time.

You can also email us at **customersupport@aat.org.uk**



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AAT is a registered charity no. 1050724

