# Group based Assessment Center Activities for Tax Accountant

## Instructions for using Template during the Interview

The purpose of this template is to provide a guide for using these Group Based Exercises during an Assessment Center for hiring new candidates.

It provides a structured approach to evaluating candidates based on their technical and behavioral competencies required for the role.

Please follow the instructions below to ensure a fair and consistent evaluation of each candidate.

1. **Review the Technical and Behavioral Competency Requirements for the Role:** Please refer to Section 1 to review the technical and behavioral competency requirements for the role. This will help you understand the key skills, knowledge, and behaviors that are essential for the candidate to possess to be successful in the role.

2. **Use the Group-Based Exercises as Assessment Center Activities:** Please refer to Section 2 & 3 of this template to understand the different group-based exercises that you can use to assess the candidates. Each exercise has been designed to evaluate specific competencies required for the role.

3. **Complete the Assessor Evaluation Form:** Please use the Assessor Evaluation Form provided towards the end of Section 2 & 3 to record your ratings and observations about the candidate during the specific assessment center activity. This form will help you capture your feedback on the candidate's performance during the exercises and their overall fit for the role.

4. **Maintain Objectivity and Fairness:** Please ensure that you remain objective and fair throughout the assessment process. Avoid making assumptions or drawing conclusions based on factors that are not related to the candidate's

performance. Also, ensure that you provide feedback based on the candidate's demonstrated behaviors rather than their personality or personal characteristics.

## Section 1: Competencies Required For Technical Recruiter

***Technical Competency Requirements:***

- Applies knowledge of tax laws to ensure compliance and minimize liabilities.
- Prepares and reviews accurate corporate, partnership, and individual tax returns.
- Utilizes tax software and tools to optimize efficiency and accuracy.
- Integrates accounting principles to analyze financial statements for tax purposes.
- Interprets complex tax regulations and provides clear guidance to stakeholders.
- Resolves tax-related problems and makes informed decisions for optimal outcomes.
- Utilizes Microsoft Office Suite proficiently for tax-related tasks.

***Behavioral Competency Requirements:***

- Communicates effectively and builds strong relationships with clients and colleagues.
- Demonstrates both independent work and effective teamwork in tax-related projects.
- Manages time and organizes tasks efficiently to meet deadlines.
- Handles confidential information with utmost integrity and professionalism.
- Exhibits a strong work ethic and commitment to delivering on time.
- Maintains a continuous learning mindset to stay updated on evolving tax regulations.

## Section 2: First Group Based Exercise

***Activity Description***

**Name of Group Based Exercise**: "Tax Compliance Case Study"

**Objective:** Assess the participants' ability to apply tax laws to ensure compliance and minimize liabilities, interpret complex tax regulations, and resolve tax-related problems for optimal outcomes.

**Competencies that will be assessed:**

- Applies knowledge of tax laws to ensure compliance and minimize liabilities
- Interprets complex tax regulations and provides clear guidance to stakeholders
- Resolves tax-related problems and makes informed decisions for optimal outcomes

**Instructions for the assessor:**

- Prepare a case study that involves a fictional company with complex tax compliance issues and challenges.
- Provide the participants with relevant financial and legal documents, such as financial statements, tax regulations, and company records.
- Clearly outline the specific tax compliance issues and challenges that need to be addressed in the case study.
- Observe and assess the participants' ability to analyze the provided information, identify compliance issues, interpret tax regulations, and propose appropriate solutions.
- Evaluate their decision-making process, reasoning, and the accuracy of their proposed solutions.

**Instructions for the participants:**

- Read and familiarize yourselves with the case study materials provided.
- Analyze the financial statements and other relevant documents to identify tax compliance issues.
- Interpret the tax regulations and guidelines applicable to the case.

- Work collaboratively with your group members to discuss and propose solutions to the identified tax compliance issues.
- Present your findings and proposed solutions to the assessors, explaining your reasoning and justifications.
- Be prepared to answer questions from the assessors regarding your proposed solutions and demonstrate your understanding of the tax laws and regulations.

**List of Job Aids that will be required to perform the activity:**

- Financial statements of the fictional company
- Tax regulations and guidelines related to the case study
- Company records and documents

***Assessment Center Activity Assessor Evaluation Form***

| | |
|---|---|
| Participant Name: | |
| Assessor Name: | |
| Date: | |

**Instructions:** Please provide ratings and observations based on the participant's performance during the assessment center activity. Use the rating scale below and provide specific examples to support your ratings.

**Rating Scale:**
1 = Below Expectations
2 = Meets Expectations
3 = Exceeds Expectations

| *Competencies Assessed* | *Rating* | *Observations* |
|---|---|---|
| Applies knowledge of tax laws to ensure compliance and minimize liabilities | | |
| Resolves tax-related problems and makes informed decisions for optimal outcomes | | |
| Interprets complex tax regulations and provides clear guidance to stakeholders | | |

**Overall Assessment:**

Based on the above criteria, please provide an overall assessment of the participant's performance during the assessment center activity.

| | |
|---|---|
| Rating | |

**Observations:**

Please provide any additional comments or feedback about the participant's performance during the assessment center activity.

**Additional Comments:**

| | |
|---|---|
| **Signature** | |
| **Assessor** | |
| **Date** | |

## Section 3: Second Group Based Exercise

***Problem Solving Exercise***

**Name of Group Based Exercise:** "Tax Return Preparation Simulation"

**Objective:** Assess the participants' ability to prepare and review accurate corporate, partnership, and individual tax returns, utilize tax software for optimization, and demonstrate proficiency in using Microsoft Office Suite for tax-related tasks.

**Competencies that will be assessed:**

- Prepares and reviews accurate corporate, partnership, and individual tax returns
- Utilizes tax software and tools to optimize efficiency and accuracy
- Utilizes Microsoft Office Suite proficiently for tax-related tasks

**Instructions for the assessor:**

- Prepare a simulation exercise where participants will be required to prepare and review tax returns for different entities (corporate, partnership, and individual).
- Provide the participants with relevant financial information, tax forms, and supporting documents.
- Assign each group a specific type of tax return to work on (e.g., one group focuses on corporate tax returns, another on partnership tax returns, and the remaining on individual tax returns).
- Assess their ability to accurately complete the tax returns, identify potential errors or omissions, and review the returns for completeness and accuracy.
- Evaluate their proficiency in using tax software and Microsoft Office Suite to complete the assigned tasks efficiently.

**Instructions for the participants:**

- Review the assigned tax return type (corporate, partnership, or individual) and familiarize yourselves with the applicable tax forms and guidelines.
- Analyze the provided financial information and supporting documents to complete the tax return accurately.
- Utilize tax software and Microsoft Office Suite to optimize efficiency and accuracy.

- Work collaboratively with your group members to review each other's completed tax returns for potential errors or omissions.
- Present your completed tax return and explain the steps taken to ensure accuracy and compliance with tax laws.
- Be prepared to answer questions from the assessors regarding your tax return preparation process and demonstrate your proficiency in using tax software and Microsoft Office Suite.

**List of Job Aids that will be required to perform the activity:**

- Financial information for each assigned entity (corporate, partnership, or individual)
- Relevant tax forms and guidelines for

***Assessment Center Activity Assessor Evaluation Form***

| | |
|---|---|
| Participant Name: | |
| Assessor Name: | |
| Date: | |

**Instructions:** Please provide ratings and observations based on the participant's performance during the assessment center activity. Use the rating scale below and provide specific examples to support your ratings.

**Rating Scale:**
1 = Below Expectations
2 = Meets Expectations
3 = Exceeds Expectations

| *Competencies Assessed* | *Rating* | *Observations* |
|---|---|---|
| Prepares and reviews accurate corporate, partnership, and individual tax returns | | |
| Utilizes Microsoft Office Suite proficiently for tax-related tasks | | |
| Utilizes tax software and tools to optimize efficiency and accuracy | | |

**Overall Assessment:**

Based on the above criteria, please provide an overall assessment of the participant's performance during the assessment center activity.

| | |
|---|---|
| Rating | |

**Observations:**

Please provide any additional comments or feedback about the participant's performance during the assessment center activity.

**Additional Comments:**

| | |
|---|---|
| **Signature** | |
| **Assessor** | |
| **Date** | |

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