Records Officer interview questions

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What to expect

Records Officer interviews are practical. Panels are usually less interested in how you describe records management in theory than in whether you can apply a schedule correctly, use an EDRMS without supervision, and make a sound call when a request is not straightforward.

- **Process and systems knowledge:** Questions about how you register, classify, sentence and retrieve records, often tied to the specific EDRMS the employer uses and to their file plan.
- **Behavioural:** Past examples of accuracy under pressure, competing deadlines, and working with staff who do not follow the rules.
- **Scenario and judgement:** A request arrives that is sensitive, incomplete or outside your authority, and the panel wants to hear how you reason it through.
- **Compliance and privacy:** Your understanding of retention and disposal schedules, disposal freezes, legal holds and privacy obligations, including when to escalate.
- **Client-facing communication:** How you deal with internal and external requests, including people who are frustrated, urgent or asking for more than they are entitled to.

Usually one interview, sometimes two. A short phone or video screen with a recruiter or the records manager covers your background, availability and systems experience, then a panel of two or three: typically the records manager, a hiring manager and sometimes an HR representative. Some employers add a short practical exercise, such as classifying a sample of documents or finding an error in a register. Government panels often ask a set of questions scored against published selection criteria, which means keeping answers structured and giving specific examples rather than general statements. You normally get time for your own questions at the end.

1. Walk me through how you register and classify a new file in an electronic records management system.

Why they ask

This is the core task of the role, so panels use it to check whether your EDRMS experience is hands-on or second hand. They are listening for the order of your steps and whether you check your work.

How to structure your answer

Treat it as a walk-through: describe the item, the search you do first, how you create or select the container, how you apply the class, and how you verify the entry before moving on. Narrate it in sequence and name the system you use.

Example answer

"I start with the item itself, checking what it is, who sent it and whether it belongs on an existing file or needs a new one. In HPE Content Manager I search by title, correspondent and date before creating anything, because duplicates are the most common problem and the hardest to unpick later. If it is new, I create the container using the file plan, add the title from the correspondence, assign the class from the business classification scheme, and let the system apply the retention and disposal class. I record the date of receipt, the correspondent and any related reference numbers, then link the item to the container. If there is a physical original or an attachment stored elsewhere, I note where it sits. Before I close it off I check the title and class once more, because a wrong class is expensive to correct once people start relying on the record."

2. Tell me about a time you found errors in records or data and what you did about it.

Why they ask

Accuracy is the whole job, and panels want an example where you noticed a problem rather than one you were told about. It also shows whether you fix the cause or just the symptom.

How to structure your answer

Use STAR. Set the scene briefly, describe how you spotted the issue, explain the specific action you took, and finish with the result plus what you put in place so it did not come back.

Example answer

"We had files registered by several different people over a couple of years, and I noticed the same correspondence appearing under two different titles. I pulled a report listing items without a container and compared it against the register, which showed the problem was mostly inconsistent naming rather than lost records. I wrote a short naming procedure with three worked examples, ran it past the records manager, and took it to the team so we all used the same conventions. I then worked through the backlog over about six weeks, merging duplicates and container items. The main result is that duplicate files stopped appearing and I could answer retrieval requests by searching instead of ringing around the business areas. I also set up a monthly check that flags items without a container, so the backlog has not rebuilt."

3. A colleague asks you to send them a file that contains personal information about a client. They say it is urgent, but they are not listed as having access to that record class. What do you do?

Why they ask

This tests judgement under pressure and whether you will hold a boundary politely. Records Officers deal with this regularly, and the wrong answer either blocks legitimate work or releases something it should not.

How to structure your answer

Show your reasoning in stages: acknowledge the urgency, state the check you would make, describe what you would do in the moment, then explain how you escalate and record it.

Example answer

"I would ask them to hold on a moment rather than say no outright, because the urgency is usually real even when the access is not. I would check the access conditions on the file and whether they are listed as an owner or contact for that record class, and I would ask what they actually need and why, since sometimes they only want a date or a reference number rather than the whole document. If they are not entitled to the full file, I would explain that I cannot release it and offer the part I can, or point them to the formal access request process. If they push back, or it is genuinely urgent and sensitive, I would take it to the records manager and let them make the call. Either way I would log the request and the outcome in the system, so there is a clear trail of what was asked and what was decided."

4. How do you stay on top of retention and disposal schedules and make sure files are sentenced correctly?

Why they ask

Sentencing is where errors have real consequences, and panels want to know you have a method rather than a vague familiarity with the schedule.

How to structure your answer

This is a method question, so explain your system: where you keep the schedule, how you match a record to a class, what you do when the description does not fit, and how you handle freezes or holds.

Example answer

"I keep the general disposal authority somewhere searchable, and I have the class numbers our business areas use most bookmarked so I am not hunting each time. When a file comes up for

sentencing I check the function it belongs to in the business classification scheme first, then match the class. If the description does not fit cleanly, I do not guess. I check whether there is a disposal freeze or a legal hold on that class, note the file, and if I am still unsure I take it to the records manager with the two or three closest options and my reasoning. I also keep a running list of the questions that come up, because they repeat, and turning those into a one page guide for the team has made sentencing faster and far more consistent."

5. Tell me about a time you changed a records process for the better.

Why they ask

It shows whether you improve the system you work in or just operate it, and gives the panel a sense of how you bring other people along.

How to structure your answer

Use STAR, and keep the focus on the change and its effect rather than the technology. Explain who else was involved, because records changes almost always depend on other teams cooperating.

Example answer

"We were losing track of physical files. People would take a box back to their desk and there was no record of it, so the next person asking for that file would be told it did not exist. I suggested we scan files out in TRIM when they left the registry and scan them back in on return, and I trialled it with one business area for a month. The trial showed it was workable but that people needed it to take seconds, so I shortened the process to a barcode scan and a single confirmation screen. We rolled it out across the team, and I ran two short sessions so everyone knew what to do. Lost files dropped away, and staff working in the business areas started checking the system themselves instead of ringing us, which freed up a good part of my day for sentencing work."

6. How would you handle an external request for records when you are not sure whether the person is entitled to see them?

Why they ask

External requests carry privacy and legal risk, and the panel wants to see that you know where your authority stops. It also tests how you communicate an unwelcome answer.

How to structure your answer

Work through it as a judgement and compliance sequence: do not release, check the request and the record, decide what you can provide, escalate what you cannot, and record everything.

Example answer

"First, I would not release anything. I would check what the request actually is, who is asking and in what capacity, and whether it falls under freedom of information, a court order, or a routine administrative request from the record's owner. I would look at the access conditions on the file, any disposal freeze, and whether it contains personal information or information about a third party. If the request is straightforward and the person is entitled, I would provide it and log the release. If it is not clear, I would tell the requester the request is being assessed and give them a realistic timeframe, then take it to the records manager or the privacy contact rather than deciding on my own. I would record the request, the decision and the reasons in the system, so if anyone reviews it later there is a clear account of how it was handled."