

README - Move Orthopedics Timesheets - v2

⚡ once happy with results **delete** field "Location - delete"

Intention of Airtable base is to give accounts manager overview of how to invoice/collect employees' salary from each of the doctors (Hardcastle, Wever, Groenewald) as result of proportion of time shared employee has spent at their practice.

Additionally, (in amendment to v1), takes into consideration if employee has received a rebate amount from hospital in which case respective amounts due by each practice is reduced.

Notice: for each variation of [Location](#) and [Type of Work](#) a new form must be submitted

✎ idea for version update (and more generic)

- extract hours worked from start and stop time (*split fields and make `Duration` type*)
 - determine overtime based thereon
- combine worksheets of different individuals working for same organization and use unique identifier to split
 - could make [Recon](#) sheet for each OR have group by this identifier in [Recon](#) sheet
 - can then also determine overtime on individual basis ie. X works 6h and Y 10h
- use [Type of Work](#) to differentiate between [Admin Hours](#) and [Theatre Hours](#)
 - convert [Hardcastle Total Hours](#), [Total Hours](#) and [Total Hours](#) into rollup fields

🔗 Requires Standardization

[Location](#)

[Type of Work](#)

How Base Works

Tables

Data

Date

(identifier)

Week Number

FORMULA

```
WEEKNUM(Date)
```

Week

SINGLE SELECT

- Week 1
- Week 2
- Week 3
- Week 4
- Week 5

deprecated

Location

SINGLE SELECT

- Hardcastle
- Wever
- Groenewald
- Practise
- ***divided equally***
- SICK
- LEAVE

Type of Work

SINGLE SELECT

- Meeting
- Theatre Preparation
- ...

Location Notes

LONG TEXT

Start-Stop Time

SINGLE LINE TEXT

Admin Hours

DURATION

FORMAT: duration (h:mm)

Theatre Hours

DURATION

FORMAT: duration (h:mm)

Overtime

DURATION

FORMAT: duration (h:mm)

Total Hours

FORMULA

""""

calculates the sum of regular and overtime hours for each record.

""""

Hours + Overtime

FORMAT: duration (h:mm)

Queries

LONG TEXT

MRH Rebate Amount Due

FORMULA

{Theatre Hours} / 3600 * 134.17

NOTICE: assumes fixed hourly rate

MHR Payment Received

CHECKBOX

Calendar Month

FORMULA

""

displays the full month name (e.g., January, February) from the Date field

""

based on field [Date](#) entered in [Timesheet Form](#)

```
IF(DATETIME_FORMAT({Date Created}, 'MMMM') = {Billing Month},  
  'No',  
  'Yes'  
)
```

Billing Month

FORMULA

""

returns the full month name for billing, shifting to the next month if the date is after the 21st

""

based on field [Date](#) entered in [Timesheet Form](#)

argument

allows user of [Recon](#) sheet to do this before "pay-day" instead of retrospectively

```
DATETIME_FORMAT(IF(  
  DAY({Date}) > 21,  
  DATEADD({Date}, 1, 'month'),  
  {Date}  
) , 'MMMM')
```

NOTE

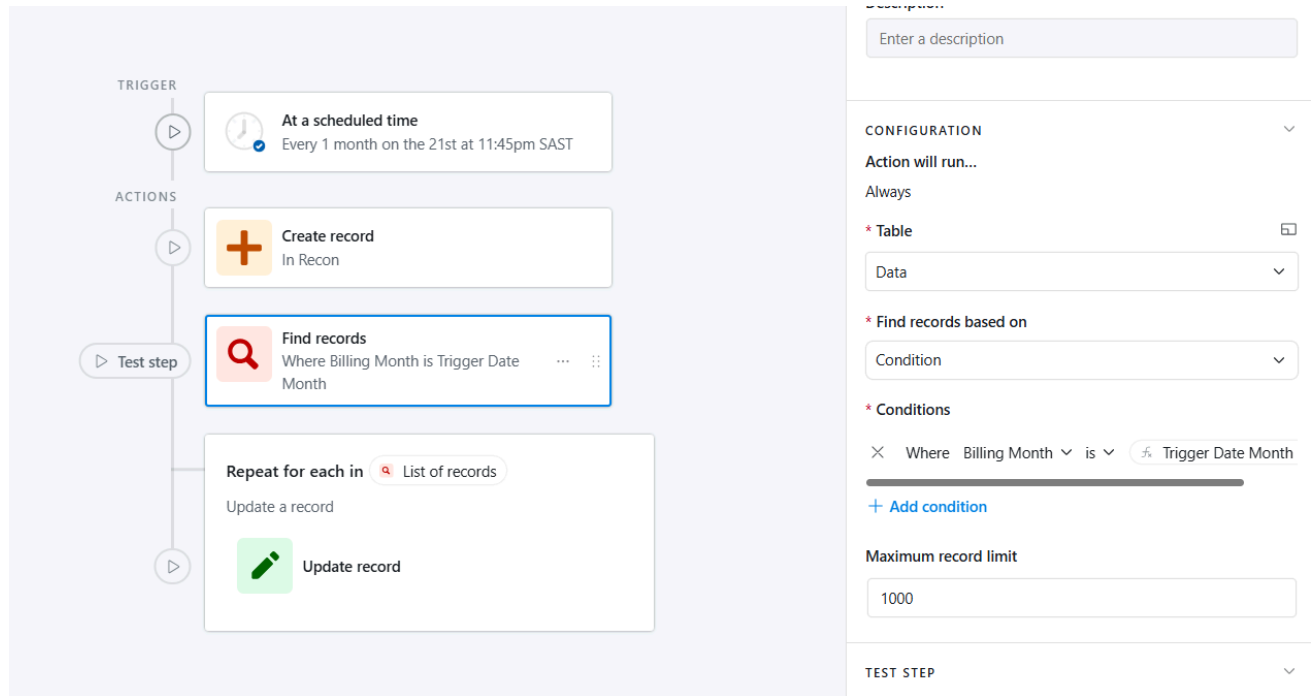
misinterpretation from my side originally

thought this was a requirement but later informed work is retrospective so can therefore remove this completely

would have to

☐ alter automation [August 2025 - end](#) to run on last day of each month

- ☐ update "Find Records" to use [Calendar Month](#) instead of [Billing Month](#)



- ☐ unlink all records from [Data](#) per record in [Recon](#)
- ☐ create custom automations to re-link all previous records (else do so manually) refer to [Back-dated \(eg. February 2025\)](#)

ALSO

is problematic if company works on calendar basis i.e., if resignation is effective first of next month since will want to view all for final "Calendar Month" of employment

Link to Recon

LINK TO ANOTHER RECORD

NOTE: do not allow linking to multiple records in [Recon](#) to prevent counting duplicated work

Date Created

BUILT-IN

enables [Is Manual Intervention Required?](#)

and can be used to verify if individual claims to have completed the form in timely manner

Is Manual Intervention Required?

FORMULA

=====

indicates if manual intervention is needed by comparing the record's creation month to the Billing Month.

if time entry logged/created is after automation trigger, will need to link data to "Recon" sheet using "MANUALLY FIX RECON" view

NB - link based on Billing Month (or Calendar Month if this option chosen)

=====

```
IF(DATETIME_FORMAT({Date Created}, 'MMMM') = {Billing Month},

    'No' ,

    'Yes'

)
```

Recon

Trigger Date Time

(identifier)

[Billing Month](#)

LOOKUP

Year

FORMULA

```
YEAR({Trigger Date Time})
```

used to generate a view

Data

Recon

+

Add or import

2025 Recon Sheet

3 hidden fields

Filtered by Year

Group

Sort

Color

Share and sync

+

Create new...

Find a view

FULL VIEW

2025 Recon Sheet

	A Trigger Date Time								
1	2025-07-27T09:00:00.058Z								
2	2025-07-29T09:00:00.098Z								
3	2025-07-29T09:00:00.133Z								
4	2025-07-29T09:00:00.137Z	March		73:20	53:00				
5	2025-07-29T09:00:00.168Z	January		43:00	12:00				
6	2025-07-29T09:00:00.228Z	April		53:00	42:00				
7	2025-07-31T21:30:00.041Z	July		17:30	12:00				
8	2025-08-21T21:45:00.035Z	August		44:30	43:30				
9	2025-09-21T21:45:38.938Z	September		21:00	17:00				
+									

In this view, show months

Where

Year

=

2025

+

Add condition

+

Add condition group

Copy from another view

Groenewald Total ...	Total Hours	Hard
0:00	170:00	
32:00	142:00	
48:00	162:30	
30:00	156:20	
0:00	55:00	
38:00	133:00	
10:00	39:30	
33:00	121:00	
19:00	57:00	

Hardcastle | Total Admin Hours

ROLLUP

using [Admin Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Hardcastle | Total Theatre Hours

ROLLUP

using [Theatre Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Wever | Total Admin Hours

ROLLUP

using [Admin Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Wever | Total Theatre Hours

ROLLUP

using [Theatre Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Groenewald | Total Admin Hours

ROLLUP

using [Admin Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Groenewald | Total Theatre Hours

ROLLUP

using [Theatre Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Practise | Total Admin Hours

ROLLUP

using [Admin Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Practise | Total Theatre Hours

ROLLUP

using [Theatre Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Total Hours

FORMULA

```
{Hardcastle | Total Hours} + {Wever | Total Hours} + {Groenewald | Total Hours}
```

FORMAT: duration (h:mm)

Practise | Total Hours

FORMULA

```
{Practise | Total Admin Hours} + {Practise | Total Theatre Hours}
```

FORMAT: duration (h:mm)

Hardcastle | Total Hours

FORMULA

```
{Hardcastle | Total Theatre Hours} + {Hardcastle | Total Admin Hours}  
+ (1/3)*{Practise | Total Hours}
```

FORMAT: duration (h:mm)

Wever | Total Hours

FORMULA


```
{Wever | Total Theatre Hours} + {Wever | Total Admin Hours} + (1/3)*  
{Practise | Total Hours}
```

FORMAT: duration (h:mm)

Groenewald | Total Hours

FORMULA

```
{Groenewald | Total Theatre Hours} + {Groenewald | Total Admin Hours}  
+ (1/3)*{Practise | Total Hours}
```

FORMAT: duration (h:mm)

Hardcastle | Admin vs Theatre

""

calculates the ratio of total theatre hours to total admin hours; allowing for insight or review.

""

```
IF({Hardcastle | Total Admin Hours} = 0, IF({Hardcastle |  
Total Theatre Hours} = 0, "NO INFORMATION", "N/A"), ROUND(({Hardcastle |  
Total Admin Hours} / {Hardcastle |  
Total Hours}) * 100) & "% vs " & ROUND(({Hardcastle |  
Total Theatre Hours} / {Hardcastle | Total Hours}) * 100) & "%")
```

Wever | Admin vs Theatre

""

calculates the ratio of total theatre hours to total admin hours; allowing for insight or review.

""

```
IF(  
  
    {Wever | Total Admin Hours} = 0,  
  
    IF(  
  
        {Wever | Total Theatre Hours} = 0,  
  
        "NO INFORMATION",  
  
        "N/A"
```

```

    ),

    ROUND(({Wever | Total Admin Hours} / {Wever |
Total Hours})) * 100) & "% vs " & ROUND(({Wever |
Total Theatre Hours} / {Wever | Total Hours})) * 100) & "%"

)

```

Groenewald | Admin vs Theatre

""""

calculates the ratio of total theatre hours to total admin hours; allowing for insight or review.

""""

```

IF({Groenewald | Total Admin Hours} = 0,

    IF({Groenewald | Total Theatre Hours} = 0,

        BLANK(),

        "0% vs 100%"

    ),

    IF({Groenewald |
Total Theatre Hours} = 0, "100% vs 0%", ROUND(({Groenewald |
Total Admin Hours} / {Groenewald |
Total Hours})) * 100) & "% vs " & ROUND(({Groenewald |
Total Theatre Hours} / {Groenewald | Total Hours})) * 100) & "%")

)

```

Hardcastle | Proportion

FORMULA

```
{Hardcastle | Total Hours} / {Total Hours}
```

FORMAT: duration (h:mm)

Wever | Proportion

FORMULA

$\{\text{Wever} \mid \text{Total Hours}\} / \{\text{Total Hours}\}$

FORMAT: duration (h:mm)

Groenewald | Proportion

FORMULA

$\{\text{Groenewald} \mid \text{Total Hours}\} / \{\text{Total Hours}\}$

FORMAT: duration (h:mm)

Total Due

FORMULA

$\{\text{Total Hours}\} / 3600 * 134.17$

FORMAT: currency (R)

MRH Rebate Amount Due

ROLLUP

using [MRH Rebate Amount Due](#)

with condition [MHR Payment Received](#) "yes"

FORMULA: `sum(values)`

FORMAT: currency (R)

Balance Due

FORMULA

$\{\text{Total Due}\} - \{\text{MRH Rebate Amount Due}\}$

Due by Hardcastle

FORMULA

$\{\text{Hardcastle} \mid \text{Proportion}\} * \{\text{Balance Due}\}$

Due by Wever

FORMULA

```
{Wever | Proportion} * {Balance Due}
```

Due by Groenewald

FORMULA

```
{Groenewald | Proportion} * {Balance Due}
```

Forms

Timesheet Form

uses [Date](#), [Location](#), [Location notes](#), [Start-Stop Time](#), [Hours](#), [Overtime](#), [Type of Work](#) records [Date Created](#) to allow for review if [no data in "Recon" sheet](#)

Automations

From this day forward (eg. August 2025 - end)

TRIGGER

▶ Test step

At a scheduled time
Every 1 month on the 21st at 11:45pm SAST

ACTIONS

▶ Create record
In Recon

▶ Find records
Where Billing Month is Trigger Date Mo...

▶ Repeat for each in List of records
Update a record

▶ Update record

TRIGGER DETAILS

Trigger type

At scheduled time

Dates and times are shown in your local time zone SAST. [Learn more](#)

CONFIGURATION

* Interval type

Months

* Timing

Every 1 month on the 21st at 11:45pm

Starting

8/1/2025


TEST STEP

Test this trigger to confirm its configuration is correct. The data from this test can be used in later steps.

Test trigger

Back-dated (eg. February 2025)

TRIGGER

 Fix configuration

ACTION

ACTIONS

At a scheduled time

On Tuesday, July 29th 2025 at 11:00am SAST

Create record

In Recon

Find records

From February 2025

Repeat for each in

Find records icon

List of records

Update a record

Update record icon

Update record

TRIGGER DETAILS

Trigger type

At scheduled time

Dates and times are shown in your local time zone SAST. [Learn more](#)

CONFIGURATION

* Interval type

One time

* Timing

This trigger's scheduled time has already passed, and will not fire.

[Set to near future](#)

On 7/29/2025 at 11:00am

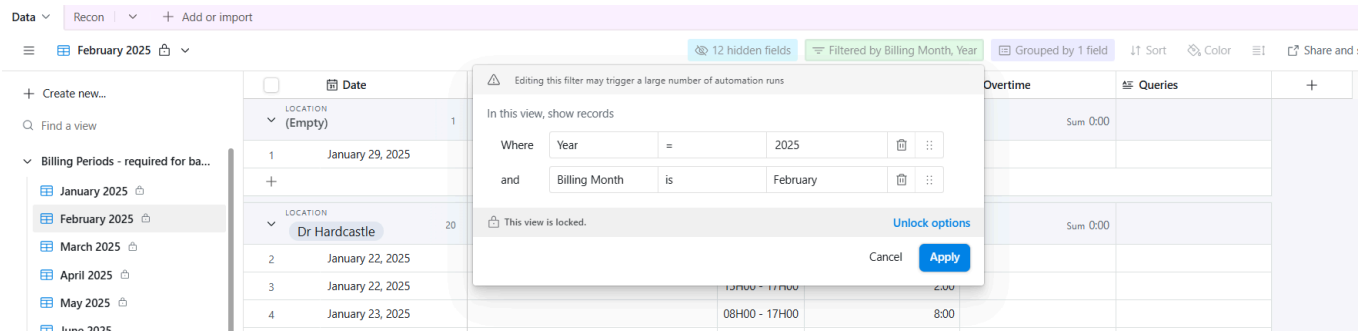
TEST STEP

Test this trigger to confirm its configuration is correct. The data from this test can be used in later steps.

Test trigger

set trigger at specific time

use views in [Data](#) as filter for records to be linked to given record in [Recon](#)



User Guide

How to Address

no data in "Recon" sheet

since [August 2025 - end](#) set to run on 21st of month (of [Billing Month](#)
if user enters data for a given [Billing Month](#) at some point *after* 21st said [Billing Month](#)







EXAMPLE

Date Created is September for Billing Month of August

	📅 Date	📅 Billing Month ⓘ	🕒 Total Hours	📅 Date Created
'4	August 4, 2025	August	8:00	9/4/2025
'5	August 5, 2025	August	8:00	9/4/2025
'6	August 6, 2025	August	4:00	9/4/2025
'7	August 6, 2025	August	2:00	9/4/2025
'8	August 6, 2025	August	3:00	9/4/2025
'9	August 7, 2025	August	8:00	9/4/2025
10	August 8, 2025	August	5:00	9/4/2025
11	August 8, 2025	August	2:00	9/4/2025
12	August 11, 2025	August	8:00	9/4/2025
13	August 12, 2025	August	8:00	9/4/2025
14	August 13, 2025	August	4:00	9/4/2025
15	August 13, 2025	August	2:00	9/4/2025
16	August 13, 2025	August	3:00	9/4/2025
17	August 14, 2025	August	8:00	9/4/2025
18	August 15, 2025	August	3:30	9/4/2025
19	August 15, 2025	August	4:30	9/4/2025
10	August 18, 2025	August	8:00	9/4/2025
11	August 19, 2025	August	8:00	9/4/2025
12	August 20, 2025	August	4:00	9/4/2025
13	August 20, 2025	August	2:00	9/4/2025
14	August 20, 2025	August	3:00	9/4/2025
15	August 21, 2025	August	8:00	9/4/2025

then there will be no data for automation to pull over and will have to refer to [how to use to](#)

[manually link data to recon sheet](#)

 Date	 Billing Month 	 Total Hours	 Date Created
June 25, 2025	July	2:00	6/27/2025
June 26, 2025	July	8:00	6/27/2025
	#ERROR!	7:00	7/16/2025
June 27, 2025	July	7:30	7/18/2025
August 1, 2025	August	5:00	9/4/2025
August 1, 2025	August	2:00	9/4/2025
August 4, 2025	August	8:00	9/4/2025
August 5, 2025	August	8:00	9/4/2025
August 6, 2025	August	4:00	9/4/2025
August 6, 2025	August	2:00	9/4/2025
August 6, 2025	August	3:00	9/4/2025
August 7, 2025	August	8:00	9/4/2025
August 8, 2025	August	5:00	9/4/2025
August 8, 2025	August	2:00	9/4/2025
August 11, 2025	August	8:00	9/4/2025
August 12, 2025	August	8:00	9/4/2025
August 13, 2025	August	4:00	9/4/2025
August 13, 2025	August	2:00	9/4/2025
August 13, 2025	August	3:00	9/4/2025
August 14, 2025	August	8:00	9/4/2025
August 15, 2025	August	3:30	9/4/2025
August 15, 2025	August	4:30	9/4/2025
 Add... 18, 2025	August	8:00	9/4/2025

may be because time logged after automation trigger

Manual Intervention Required (time logged after automation trig

 Formula 

Compute values based on fields. [Learn more](#)

Formula Formatting

```
IF(DATETIME_FORMAT({Date Created}, 'MMMM') =  
{Billing Month},  
  'No',  
  'Yes'  
)
```

Preview for January 9, 2025 : Yes

Create formula with AI

Description

will need to link data to recon sheet using MANUALLY FIX
RECON view (NB - link based on Billing Month)

Generate description

Cancel

Save

how to use to manually link data to recon sheet

use view MANUALLY FIX RECON

+

Create new...

Q

Find a view

▼

My personal views

📄

Maryka's Timesheet Form

1

▼

Billing Periods - required for ba...

📅

January 2025

🔒

📅

February 2025

🔒

📅

March 2025

🔒

📅

April 2025

🔒

📅

May 2025

🔒

📅

June 2025

🔒

📅

July 2025

🔒

▼

Weekly Overview

📅

Dr Hardcastle

📅

Dr Wever

📅

Weekly Overview

📅

Dr Groenewald

▼

Monthly Overview

📅

2025 Monthly Overview - by ...

📅

2025 Monthly Overview - by ...

☐

📅

Date

📅

Billing Month

ⓘ

⌵

Recon

🕒

Total Hours

📅

Date Created

+

1

#ERROR!

7:00

7/16/2025

2

August 1, 2025

August

2:00

9/4/2025

3

August 4, 2025

August

8:00

9/4/2025

4

August 5, 2025

August

8:00

9/4/2025

5

August 6, 2025

August

4:00

9/4/2025

6

August 6, 2025

August

2:00

9/4/2025

7

August 6, 2025

August

3:00

9/4/2025

8

August 7, 2025

August

8:00

9/4/2025

9

August 8, 2025

August

5:00

9/4/2025

10

August 8, 2025

August

2:00

9/4/2025

11

August 11, 2025

August

8:00

9/4/2025

12

August 12, 2025

August

8:00

9/4/2025

13

August 13, 2025

August

4:00

9/4/2025

14

August 13, 2025

August

2:00

9/4/2025

15

August 13, 2025

August

3:00

9/4/2025

16

August 14, 2025

August

8:00

9/4/2025

17

August 15, 2025

August

3:30

9/4/2025

18

August 15, 2025

August

4:30

9/4/2025

19

August 18, 2025

August

8:00

9/4/2025

20

August 19, 2025

August

8:00

9/4/2025

based on [Billing Month](#) select corresponding entry from [Recon](#)
NOTICE: an entry will be made after 21st of each month (by automation [August 2025 - end](#), otherwise have to create own in [Recon](#))

ort

12 hidden fields

Filtered

<input type="checkbox"/>	<div>📅</div> Date	<div>📅</div> Billing Month	<div>⌵</div> Recon	<div>🕒</div> Total Hours	<div>📅</div> Date Created	+
1		#ERROR!		7:00	7/16/2025	
<input type="checkbox"/>	August 1, 2025	August	<div>+</div>	2:00	9/4/2025	
3	August 4, 2025	August				
4	August 5, 2025	August				
5	August 6, 2025	August				
6	August 6, 2025	August				
7	August 6, 2025	August				
8	August 7, 2025	August				
9	August 8, 2025	August				
10	August 8, 2025	August				
11	August 11, 2025	August				
12	August 12, 2025	August				
13	August 13, 2025	August				
14	August 13, 2025	August				
15	August 13, 2025	August				

Search

2025-07-29T09:00:00.168Z

Trigger Date Month

Billing Month

Year

Link to Data

July

January

2025

January 9, 2025

Jar

2025-07-29T09:00:00.228Z

Trigger Date Month

Billing Month

Year

Link to Data

July

April

2025

March 24, 2025

Mi

2025-07-31T21:30:00.041Z

Trigger Date Month

Billing Month

Year

Link to Data

July

July

2025

June 23, 2025

June

2025-08-21T21:45:00.035Z

Trigger Date Month

Billing Month

Year

Link to Data








August

August

2025

August 1, 2025

then pull this through to all matching [Billing Month](#) entries

<input type="checkbox"/>	 Date	 Billing Month 	 Recon	 Total Hours	 Date Created	+
177	August 6, 2025	August	2025-08-21T21:45:00.035Z	2:00	9/4/2025	
178	August 6, 2025	August	2025-08-21T21:45:00.035Z	3:00	9/4/2025	
179	August 7, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025	
180	August 8, 2025	August	2025-08-21T21:45:00.035Z	5:00	9/4/2025	
181	August 8, 2025	August	2025-08-21T21:45:00.035Z	2:00	9/4/2025	
182	August 11, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025	
183	August 12, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025	
184	August 13, 2025	August	2025-08-21T21:45:00.035Z	4:00	9/4/2025	
185	August 13, 2025	August	2025-08-21T21:45:00.035Z	2:00	9/4/2025	
186	August 13, 2025	August	2025-08-21T21:45:00.035Z	3:00	9/4/2025	
187	August 14, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025	
188	August 15, 2025	August	2025-08-21T21:45:00.035Z	3:30	9/4/2025	
189	August 15, 2025	August	2025-08-21T21:45:00.035Z	4:30	9/4/2025	
190	August 18, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025	
191	August 19, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025	
192	August 20, 2025	August	2025-08-21T21:45:00.035Z	4:00	9/4/2025	
193	August 20, 2025	August	2025-08-21T21:45:00.035Z	2:00	9/4/2025	
194	August 20, 2025	August	2025-08-21T21:45:00.035Z	3:00	9/4/2025	
<input type="checkbox"/>	 August 21, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025	
196	August 22, 2025	September		5:00	9/4/2025	
197	August 22, 2025	September		3:00	9/4/2025	
198	August 25, 2025	September		8:00	9/4/2025	