

Airtable README - Move Orthopedics Timesheets - v5

aka Corali

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.

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

therefore these fields set to "Single Select" type fields (previously "Multiple Select")

✎ Idea for Future Version (and more generic)

refer to refer to v3 - grouped

- extract hours worked from start and stop time (*split fields to [Start Time](#) and [End Time](#) - "Duration" type fields*)
 - determine overtime based thereon
- combine worksheets of different individuals working for same organization and use unique identifier (Name or ID Number) to split entries
 - 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

🔗 Requires Standardization

[Location](#)

[Type of Work](#)

How Base Works

Tables

Data

Date

(identifier)

Week Number

Type: Formula

```
WEEKNUM(Date)
```

Location

Type: Single Select

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

Type of Work

Type: Multiple Select

- Meeting
- Theatre Preparation
- ...

Location Notes

Type: Long Text

Start-Stop Time

Type: Single Line Text

Admin Hours

Type: Duration

Format: duration (h:mm)

Theatre Hours

Type: Duration

Format: duration (h:mm)

Overtime

Type: Duration

Format: duration (h:mm)

Total Hours

Type: Formula

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

```
Hours + Overtime
```

Format: duration (h:mm)

Queries

Type: Long Text

MRH Rebate Amount Due

Type: Formula

```
{Theatre Hours} / 3600 * 134.17
```

NOTICE: assumes fixed hourly rate

MHR Payment Received

Type: Checkbox

NOTICE: used for [Recon > Balance Due](#)

Calendar Month

Type: Formula

Description: 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

refer to v1 for more detail

once satisfied with base - delete this field

Link to Recon

Type: Link to Other Records

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

Date Created

Type: Built-In

NOTICE: 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?

Type: Formula

Description: 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(  
  
  AND(  
  
    DATETIME_FORMAT({Date}, 'MMMM') = {Billing Month},  
  
    {Link to Recon} = BLANK()  
  
  ),  
  
  'Yes',  
  
  'No'
```

)

Recon

Trigger Date Time

(identifier)

Previous Month aka Billing Month

Type: Formula

Description: used in automation [for future Recon updates](#) to group all records from previous month in [Data](#) sheet into same [Recon](#) sheet record

```
DATETIME_FORMAT(  
  
    DATEADD({Trigger Date Time}, -1, 'month'),  
  
    'MMMM'  
  
)
```

The screenshot displays an automation workflow on the left and its configuration details on the right.

Workflow:

- TRIGGER:** At a scheduled time (Every 1 month on the 5th and last day at 11:00).
- ACTIONS:**
 - Create record (In Recon)
 - Find records (Where Billing Month is Previous Month aka Billing Month)
 - Repeat for each in (List of records) - Update a record
 - Update record
- Test step:** A button labeled "Test step" is located between the "Find records" and "Repeat for each in" actions.

Configuration Panel (ACTION DETAILS):

- Action type:** Find records (Find up to 1000 records in this base either from a view or based on specific conditions.)
- LABELS:** Description (Enter a description)
- CONFIGURATION:**
 - Action will run...: Always
 - * Table: Data
 - * Find records based on: Condition
 - * Conditions: Where Billing Month is Previous Month aka Billing Month
 - + Add condition
 - Maximum record limit: 1000
- TEST STEP:** Test this trigger to confirm its configuration is correct. The data from this test can be used in later steps. Test output is limited to 10 records.

A "Test action" button is located at the bottom right of the configuration panel.

Year

Type: Formula

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

used to generate a view

2025 Recon Sheet

+

Create new...

Q

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
5	2025-07-29T09:00:00.168Z
6	2025-07-29T09:00:00.228Z
7	2025-07-31T21:30:00.041Z
8	2025-08-21T21:45:00.035Z
9	2025-09-21T21:45:38.938Z
+	

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

Type: Rollup

using [Admin Hours](#)

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Hardcastle | Total Theatre Hours

Type: Rollup

using [Theatre Hours](#)

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Wever | Total Admin Hours

Type: Rollup

using [Admin Hours](#)

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Wever | Total Theatre Hours

Type: Rollup

using [Theatre Hours](#)

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Groenewald | Total Admin Hours

Type: Rollup

using [Admin Hours](#)

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Groenewald | Total Theatre Hours

Type: Rollup

using [Theatre Hours](#)

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Practise | Total Admin Hours

Type: Rollup

using [Admin Hours](#)

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Practise | Total Theatre Hours

Type: Rollup

using [Theatre Hours](#)

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Total Hours

Type: Formula

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

Hours}

Format: duration (h:mm)

Practise | Total Hours

Type: Formula

$$\{\text{Practise} \mid \text{Total Admin Hours}\} + \{\text{Practise} \mid \text{Total Theatre Hours}\}$$

Format: duration (h:mm)

Hardcastle | Total Hours

Type: Formula

$$\{\text{Hardcastle} \mid \text{Total Theatre Hours}\} + \{\text{Hardcastle} \mid \text{Total Admin Hours}\} + (1/3) * \{\text{Practise} \mid \text{Total Hours}\}$$

Format: duration (h:mm)

Wever | Total Hours

Type: Formula

$$\{\text{Wever} \mid \text{Total Theatre Hours}\} + \{\text{Wever} \mid \text{Total Admin Hours}\} + (1/3) * \{\text{Practise} \mid \text{Total Hours}\}$$

Format: duration (h:mm)

Groenewald | Total Hours

Type: Formula

$$\{\text{Groenewald} \mid \text{Total Theatre Hours}\} + \{\text{Groenewald} \mid \text{Total Admin Hours}\} + (1/3) * \{\text{Practise} \mid \text{Total Hours}\}$$

Format: duration (h:mm)

Hardcastle | Admin vs Theatre

Description: 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

Description: 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

Description: 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

Type: Formula

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

Format: duration (h:mm)

Wever | Proportion

Type: Formula

```
{Wever | Total Hours} / {Total Hours}
```

Format: duration (h:mm)

Groenewald | Proportion

Type: Formula

```
{Groenewald | Total Hours} / {Total Hours}
```

Format: duration (h:mm)

Total Due

Type: Formula

```
{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

Type: Formula

```
{Total Due} - {MRH Rebate Amount Due}
```

Due by Hardcastle

Type: Formula

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

Due by Wever

Type: Formula

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

Due by Groenewald

Type: Formula

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

Forms

Timesheet Form

uses [Date](#), [Location](#), [Location notes](#), [Start-Stop Time](#), [Hours](#), [Overtime](#), [Type of Work](#)

Automations

for future Recon updates

eg. November 2025 - end

TRIGGER

▶

At a scheduled time
Every 1 month on the 5th and last day at 11:...

ACTIONS

▶

Create record
In Recon

▶

Find records
Where Billing Month is Previous Month ...

▶

Repeat for each in 🔍 List of records
Update a record

✎ Update record ... ⋮

▶ Test step

ACTION DETAILS

Action type

✎ Update record ▼

Update specific fields, or apply a template to a record. Choose which record to update by selecting its table and record ID.

LABELS
Description

Enter a description

CONFIGURATION
Action will run...
Always
* Table

🗲

Recon ▼

* Record ID
ID of the record to update. To update a record from a previous step, use the + menu to choose the step and its Record ID. Must correspond to the selected table.

🔍 Airtable record ID ▼ +

* Fields

🔗 Link to Data

Choose record(s) to link to, by entering record IDs or names


🔍 Airtable record ID ▼ +

+ Choose field


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


for back-dated Recon updates


TRIGGER


 Fix configuration

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  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

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

Create new...

- Billing Periods - required for back-dating Recon table
- January 2025
- February 2025
- March 2025**
- April 2025
- May 2025
- June 2025
- July 2025
- August 2025
- September 2025

Date	Location Notes	Hours
8 March 7, 2025		
9 March 10, 2025		
10 March 11, 2025		
11 March 12, 2025		
12 March 12, 2025		
13 March 12, 2025		
14 March 13, 2025		
15 March 14, 2025		08H00 - 16H00
16 March 17, 2025		08H00 - 17H00
17 March 18, 2025		08H00 - 17H00
18 March 19, 2025		08H00 - 12H00
19 March 19, 2025		12H00 - 14H00
20 March 19, 2025		15H00 - 17H00
21 March 20, 2025		08H00 - 17H00
22 March 21, 2025		13H00 - 15H00
23 March 24, 2025		08H00 - 17H00
24 March 25, 2025		08H00 - 17H00

In this view, show records
 Where Year ▾ * ▾ 2025 [X] [⋮]
 and ▾ Billing Month ▾ is ▾ March [X] [⋮]
[+ Add condition](#) [+ Add condition group](#) ⓘ
Copy from another view
Cancel Apply

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