

Airtable README Maintenance Guide - Move Orthopedics Team Feedback - v2

Below is a revised and more polished version of your Airtable base setup explanation for the Obsidian document. The content retains **all original information** and **media** as requested, while improving clarity, structure, and flow to make it more well-rounded. I've refined the language, standardized formatting, corrected typos, and organized sections for better readability without altering the core details or images.

Airtable Base Setup for Feedback and Retrospectives

Terminology

- **Period** refers to **Month Year** (e.g., August 2025).
- **Records** are individual submissions or entries in a table.
- **Summary Tables** aggregate feedback for individuals, teams, or the organization.

Important Notes

- **View Customization:** You can group views in any way that suits your workflow, except for the **locked views** in the **Team Structure** table, which must remain unchanged.
- **Date Created vs. Feedback Period:** The **Date Created** field may not align with the period for which feedback is given (e.g., feedback for August 2025 submitted in September 2025). Therefore, the **Month Year (from Date Created)** field is unreliable for grouping feedback.
- **Relationship Complexity:**
 - The relationship between the **Monthly 360 Feedback** and **Monthly 360 Feedback: Summary** tables is complex. A single record in **Monthly 360 Feedback: Summary** can represent **two levels of summaries**: one for an individual and one for the team.
 - In contrast, **Monthly Full Team Retro: Summary** and **Quarterly Full Team Retro: Summary** tables link each record to either a team or organizational summary, making their relationships simpler.
 - Each record in **Monthly 360 Feedback**, **Monthly Full Team Retro**, and **Quarterly Full Team Retro** links to their respective summary tables in **two distinct ways**, but only **Monthly 360 Feedback** links a single record to **multiple records** in its summary table.

FAQ

How do I add or remove team members?

See [Updating Team Structure](#).

How do I update the 'Year' or 'Name' dropdowns in forms?

See [Configuring Dropdowns](#) for Year Dropdown Limitation or Name Dropdown Selection.

How do I understand the naming conventions and their links to summary tables?

See [Explanation of Record Naming and Summary Table Links](#).

Solutions

Explanation of Record Naming and Summary Table Links

Monthly 360 Feedback Table

Records in this table capture feedback submitted for individuals and teams. The naming conventions and automation logic are as follows:

Record Naming

Name : Month Year represents the **name of the person who submitted the form** and the **month/year** for which feedback is given

Month Year : Team : Team Member Receiving Feedback represents the **period, team**, and **name of the person receiving feedback**

used to populates **two linked record fields** in the **Monthly 360 Feedback: Summary** table:

- for Personal Summary
- for Team Summary

Automations

 **if automations fail, manually update links as described in [Verifying and Correcting Record Links](#).**

Link to Monthly Full Team Retro Summary

Personal-Level Feedback

when a record is submitted:

1. for Personal Summary field is populated with the value from Month Year : Team : Team Member Receiving Feedback .

this **creates a new record** in the *Monthly 360 Feedback: Summary* table if none exists for that individual and period, or **links to an existing record** if one already exists

so that feedback for the same individual in the same period is grouped in *Monthly 360 Feedback: Summary* under Name Month Year : Team : Team Member and **AI-generated summary** is created as Individuals' Feedback Retro

Team-Level Feedback

when a record is submitted:

1. **all records** in **Monthly 360 Feedback** with the same **team** and **period** (Month Year : Team) are identified
2. for Team Summary field is populated with all matching Month Year : Team : Team Member records

so that all feedback for a given team and period is grouped in *Monthly 360 Feedback: Summary* under Name Month Year : Team : Team Member and **AI-generated summary** is created as Team Feedback Retro

⚡ **only the last-submitted record for a team/period will include links to all prior feedback for that team/period**

addressed using additional automation [Link to Monthly 360 Feedback Summary — retrospective](#)

Link to Monthly 360 Feedback: Summary — retrospective

Team-Level Feedback

when a record is submitted:

1. finds **all existing records** for the same **team** and **period**
2. updates the for Team Summary field in **all prior records** to include the new record

so that each record in *Monthly 360 Feedback: Summary* for a given team/period is linked to **all feedback** for that team/period, ensuring consistency therefore record can now be used to generate a complete Team Feedback Retro

Key Implications

Team-Specific Views

- Any record for a given team and period can generate **nearly identical** team-level summaries. Slight variations may occur due to AI processing.
*(ideally, views would display **only one record per team/period** to avoid redundancy)*

Overall - by Month Year by Team				
	A. Month...	Month Year	①	% Team Feedback Retro
+ Create new...				
Q Find a view				
✓ Individual Specific				
by Year by Month				
by Team				
by Member				
Holistically				
✓ Team Specific				
Overall - by Month Year				
Overall - by Team				
Overall - by Month Year by Team				
✓ More collaborative views				
FULL VIEW				
EDITABLE				
	A. Month...	Month Year	①	% Team Feedback Retro
	MONTH YEAR			
	August 2025	10		
	TEAM RECEIVING FEEDBACK			
	Billing	2		
	1	August 2025 ... August 2025	Team Name: Sylvia Benade...	 Team Feedback PDF
	2	August 2025 ... August 2025	Team Name: Letitia Kotze...	 Team Feedback PDF
	TEAM RECEIVING FEEDBACK			
	Clinical	3		
	3	August 2025 ... August 2025	Team Name: Clinical...	 Team Feedback PDF
	4	August 2025 ... August 2025	Team Name: Waldi Wever...	 Team Feedback PDF
	5	August 2025 ... August 2025	Team Name: Maryka van Eyk...	 Team Feedback PDF
	TEAM RECEIVING FEEDBACK			
	Doctors	2		
	6	August 2025 ... August 2025	Team Name: Peter Hardcastle...	 Team Feedback PDF
	7	August 2025 ... August 2025	Team Name: Doctors...	 Team Feedback PDF
	TEAM RECEIVING FEEDBACK			
	Reception	3		
	8	August 2025 ... August 2025	Team Name: Angie Bekker...	 Team Feedback PDF
	9	August 2025 ... August 2025	Team Name: Deldre van Eck...	 Team Feedback PDF
	10	August 2025 ... August 2025	Team Name: Melissa Stanley...	 Team Feedback PDF
	MONTH YEAR			
	July 2025	3		
	TEAM RECEIVING FEEDBACK			
	Clinical	1		

Individual-Specific Views

- Each record generates a **unique personal summary** for the individual receiving feedback.

by Member					
	A. Month Year : Team Member	Year	Month	Individuals: Feedback Retro	
+ Create new...					
Q Find a view					
✓ Individual Specific					
by Year by Month					
by Team					
by Member					
Holistically					
✓ Team Specific					
Overall - by Month Year					
Overall - by Team					
Overall - by Month Year by Team					
✓ More collaborative views					
FULL VIEW					
EDITABLE					
	A. Month Year : Team Member	Year	Month	Individuals: Feedback Retro	
	INDIVIDUAL RECEIVING FEEDBACK				
	Deldre van Eck	4			
	9	May 2025 : Reception : Deldre van Eck	2025	May	Some of your colleagues have noted that you consistently demonstrate a strong commitment to...
	10	June 2025 : Reception : Deldre van Eck	2025	June	Some of your colleagues have noted that you are approachable, supportive, and consistently foster...
	11	August 2025 : Reception : Deldre van Eck	2025	August	Some of your colleagues have noted that you consistently demonstrate exceptional dedication and...
	12	September 2025 : Reception : Deldre van Eck	2025	September	Some of your colleagues have noted that you demonstrate a proactive attitude, eagerness to learn...
	INDIVIDUAL RECEIVING FEEDBACK				
	Johann Groenewald	2			
	13	June 2025 : Doctors : Johann Groenewald	2025	June	Some of your colleagues have noted that you build strong relationships with patients, communicating...
	14	September 2025 : Doctors : Johann Groenewald	2025	September	Some of your colleagues have noted that you have made a positive impact by dedicating more time...
	INDIVIDUAL RECEIVING FEEDBACK				
	Kelly Massyn	2			
	15	August 2025 : Clinical : Kelly Massyn	2025	August	Some of your colleagues have noted that you proactively organize meetings to improve practice...
	16	September 2025 : Clinical : Kelly Massyn	2025	September	Some of your colleagues have noted that you are helpful and proactive, consistently contributing to...
	INDIVIDUAL RECEIVING FEEDBACK				
	Letitia Kotze	4			
	17	May 2025 : Billing : Letitia Kotze	2025	May	Some of your colleagues have noted that you consistently provide quick and effective responses to...
	18	June 2025 : Billing : Letitia Kotze	2025	June	Some of your colleagues have noted that you have made positive efforts to improve communicatio...
	19	August 2025 : Billing : Letitia Kotze	2025	August	Some of your colleagues have noted that you consistently demonstrate strong teamwork, effective...
	20	September 2025 : Billing : Letitia Kotze	2025	September	Some of your colleagues have noted that you respond promptly to tasks and messages, which...
	INDIVIDUAL RECEIVING FEEDBACK				
	+ Add...	41 feedback			

Holistic Overview

- Combining **personal feedback** and **team context** produces a **holistic overview** per individual (e.g., "your feedback + team context").
- This differs from a **team-wide retro**, which aggregates all team feedback; for a true team-wide retro, refer to methodology used in [`Monthly Full Team Retro` Table](#)

Monthly Full Team Retro Table

This table captures team and organizational feedback submitted monthly.

Record Naming

Name : Month Year : Team represents the **name of the person who submitted the form**, the **period**, and the **team** they are part of

Month Year : Team represents the **period** and **team** for which feedback is given

Month Year : Organization represents the **period** and **organization**

Automations

Link to Monthly Full Team Retro Summary

Team Level Feedback

when form is submitted:

- for **Team Summary** field is populated with the value from **Month Year : Team**
creates a new record in the *Monthly Full Team Retro: Summary* table if none exists for that team/period, or **links to an existing record**.

such that all records for the same team and period are grouped under one record in the *Monthly Full Team Retro: Summary* table.

Organizational Level

when form is submitted:

- for Organisational Summary field is populated with the value from Month Year :

Organization

creates a new record in the *Monthly Full Team Retro: Summary*table if none exists for that organization/period, or **links to an existing record**

such that all records for the same organization and period are grouped under one record in the *Monthly Full Team Retro: Summary* table

Key Implications

Team Specific" views

(e.g., "-- Team")

for a given period and team

The screenshot shows a Dynamics 365 view interface with the title "Billing Team". The view displays a table of monthly feedback entries for the Billing team in June 2025. The columns are labeled "A M...", "Month", "% Team Specific Feedback Retro", "Done", and "Team Specific PDF". The table contains six rows, each with a "Done" checkbox and a "Team Specific PDF" button. The rows are numbered 1 through 6. Row 1 is for June 2025, and row 6 is for October 2025. The "Team Specific PDF" button for row 1 is highlighted in blue.

	A M...	Month	% Team Specific Feedback Retro	Done	Team Specific PDF	
1	June 2025	June	Billing The Billing team reported a positive and productive ...	<input type="checkbox"/>	<button>Monthly Team Retro</button>	Letitia Kotze, Sylvia Benade
2	May 2025	May	Billing The Billing team reported a generally positive morale, with ...	<input type="checkbox"/>	<button>Monthly Team Retro</button>	Sylvia Benade, Letitia Kotze
3	July 2025	July	Required field(s) are empty or unavailable	<input type="checkbox"/>	<button>Monthly Team Retro</button>	
4	August 2025	August	Billing The Billing team reported a generally positive sentiment, ...	<input type="checkbox"/>	<button>Monthly Team Retro</button>	Letitia Kotze, Sylvia Benade
5	September 2025	September		<input type="checkbox"/>	<button>Monthly Team Retro</button>	Sylvia Benade
6	October 2025	October	Billing The Billing team demonstrated a strong commitment to ...	<input type="checkbox"/>	<button>Monthly Team Retro</button>	Letitia Kotze

Use the "Organizational" view

for a given period

Month	Description	Participants
February 2024	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...	Taneal Govender, Proud, Fatima, Adinda Marx, Aubrey Rakuba, Hugh Moswazi, Magdalene Mahlangu, Bantina Mabitsela
March 2024	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...	Nonhlanhla Mpongo
June 2024	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...	Hugh Moswazi, Proud, Magdalene Mahlangu, Aubrey Rakuba, Fatima, Bantina Mabitsela, Taneal Govender, Adinda Marx, Nonhlanhla Mpongo
September 2024	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...	Proud, Aubrey Rakuba, Adinda Marx, Magdalene Mahlangu, Fatima, Taneal Govender, Hugh Moswazi, Bantina Mabitsela, Nonhlanhla Mpongo
May 2025	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...	Waldi Wever, Dediire van Eck, Melissa Staney, Sylvia Benade, Corali de Wet, Letitia Kotze, Maryka van Eyk, Angie Bekker, Stefan Wever
June 2025	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...	Dediire van Eck, Letitia Kotze, Maryka van Eyk, Sylvia Benade, Angie Bekker, Melissa Staney, Johann Groenewald, Brettha Groenewald
July 2025	Full Organisation Summary The monthly Retro feedback from Move Orthopaedics ...	Corali de Wet, Angie Bekker
August 2025	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...	Waldi Wever, Melissa Staney, Letitia Kotze, Stefan Wever, Maryka van Eyk, Sylvia Benade
September 2025	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...	Brettha Groenewald, Kelly Massyn, Dediire van Eck, Sylvia Benade, Angie Bekker, Melissa Staney
October 2025	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...	Letitia Kotze, Corali de Wet

Quarterly Full Team Retro Table

This table captures team and organizational feedback submitted quarterly.

Record Naming

Name : Team : Quarter represents the **name of the person who submitted the form, their team, and the quarter** for which feedback is given

Year : Quarter : Team represents the **year, quarter, and team**

Year : Quarter : Organization represents the **year, quarter, and organization**

Automations

Linking to Quarterly Full Team Retro: Summary

Team Level Summary

when form is submitted:

1. for Team Summary field is populated with the value from Year : Quarter : Team . **creates a new record** in the *Quarterly Full Team Retro: Summary* table if none exists for that team/period, or **links to an existing record**

such that all records for the same team and quarter are grouped under one record in the *Quarterly Full Team Retro: Summary* table.

Organizational Level

when form is submitted:

- for Organisational Summary field is populated with the value from Year : Quarter : Organization

creates a new record in the *Quarterly Full Team Retro: Summary* table if none exists for that organization/period, or **links to an existing record**

such that all records for the same organization and quarter are grouped under one record in the *Quarterly Full Team Retro: Summary* table.

Key Implications

Team Specific" views

(e.g., "-- Team")

for a given period and team

YEAR	QUARTER	Team	Description	Action
2025	April - June	Clinical	The team consistently demonstrates strong communication...	Quarterly Team Retro

Use the "Organizational" view

for a given period

YEAR	QUARTER	Team	Description	Action
2023	July - September	Move Orthopedics	The team demonstrated...	Quarterly Organizational Retro
2024	July - September	Move Orthopedics	The team demonstrated...	Quarterly Organizational Retro

Team Structure Table

The **Team Structure** table centralizes team member information and controls which names appear in dropdowns for forms in other tables.

Fields

- **Team Members Name** : The name of the team member.
- **Team(s)** : The team(s) the member belongs to.
- **Participants Involvement** : Defines the forms (e.g., Monthly Team Retro, Monthly 360 Feedback, Quarterly Team Retro) where the member's name appears.
- **Active Member** : A "Yes" or "No" field that determines whether the member's name appears in dropdowns via the **Active Participants** view.

Views and Form Integration

The **Active Participants** view filters names based on the **Active Member** field and is used to populate dropdowns in the following forms:

1. Monthly 360 Feedback

- Form: *MOVE Orthopaedics MONTHLY Team Feedback*
- Associated Table: **Monthly 360 Feedback**

- View:

MOVE Orthopaedics MONTHLY Team Feedback

Now let's give each other feedback. Please take some time to complete the form below for yourself and then for the person that you are giving feedback to.

The screenshot shows a configuration panel for a 'Name' field. At the top, there is a search bar labeled 'Name' with a dropdown arrow, and a 'Required' toggle switch which is turned on (green). Below the input field, there is a placeholder text 'Add some help text'. A 'Add' button is located to the right of the input field. In the bottom section, there are two configuration options: a checked 'Limit record selection to a view' checkbox and a dropdown menu set to 'Monthly 360 Feedback View'. A tooltip for the dropdown states: 'Record selection will be limited to records from Monthly 360 Feedback View'. There is also an unchecked 'Show field only when conditions are met' checkbox.

2. Monthly Full Team Retro

- Form: *MOVE Orthopaedics MONTHLY Team Retro*
- Associated Table: **Monthly Full Team Retro**

- View:

MOVE Orthopaedics **MONTHLY** Team Retro

Let's take some time to reflect holistically on the last month, try not to allow recency bias to skew your feedback for the month. We would like teams to get as much constructive feedback as possible, so please add as much detail as you can.

The screenshot shows a configuration interface for a 'Name' field. At the top, there is a search bar labeled 'Name' with a dropdown arrow and a 'Required' checkbox with a green circle indicating it is checked. Below the search bar, the word 'Name' is displayed in bold. Underneath 'Name', there is a placeholder text 'Add some help text'. A button labeled '+ Add' is located below the placeholder. A dropdown menu is open, showing the option 'Monthly Full Team Retro View' selected. A tooltip below the dropdown states: '(i) Record selection will be limited to records from Monthly Full Team Retro View'. There is also an unchecked checkbox labeled 'Show field only when conditions are met'.

3. Quarterly Full Team Retro

- Form: *Team QUARTERLY Retro & Feedback Form*
- Associated Table: **Quarterly Full Team Retro**

- View:

Team QUARTERLY Retro & Feedback Form

It's almost time to come together as a team for our next Team Quarterly. In preparation for this, please take a few minutes to complete your feedback on the last quarter.

(Questions 1-5 focus on your team as a whole and their interaction within each of our focus areas)

The screenshot shows a 'Name' field configuration. At the top, there is a header with a 'Name' dropdown and a 'Required' toggle switch. Below the header, the field is labeled 'Name' and has a placeholder 'Add some help text'. A '+ Add' button is located below the placeholder. A detailed configuration panel is open, showing the following settings:

- Limit record selection to a view
- Quarterly Full Team View (selected)
- (i) Record selection will be limited to records from Quarterly Full Team View
- Show field only when conditions are met

ⓘ design ensures centralized control and standardized naming across tables, which is critical for the automation logic described in [Explanation of Record Naming and Summary Table Links](#).

Verifying and Correcting Record Links

Use views under the **Manual Check** section to verify that records are correctly linked to their summary tables. If issues are found, manually correct them as described below.

⌚ if no matching record exists in a summary table, a new record is created. If a record exists, the new entry is linked to it.

Monthly Full Team Retro Table

Check Who Has Submitted Reviews

- **View:** "Check who has submitted for given month & year"
- **Action:** Update filters to select the correct month and year.

Ensure All Records Are Linked

- **View:** "Ensure all records linked to Summary table"
- **Expected Result:** The view should be empty.

- **If Not Empty:**
 - Copy and paste (or drag) values:
 - From Month Year : Team to for Team Summary .
 - From Month Year : Organization to for Organizational Summary .

Monthly 360 Feedback Table

Ensure All Fields Are Linked

- **View:** "Ensure all records linked to Summary table"
- **Expected Result:** The view should be empty.

- **If Not Empty:**

- **For Personal Summary:**

- Copy and paste (or drag) values from **Name : Month Year** to **for Personal Summary**.

Name : Month Year	for Personal Summary	Month Year : Team
Angie Bekker : June 2025	June 2025 : Billing; Sylvia Benade	June 2025 : Reception

- **For Team Summary:**

- Use the **Month Year : Team Receiving Feedback** field to identify **all records** that should be linked for the same team and period.
- Update the **for Team Summary** field to include all relevant records.

Name : Month Year	for Team Summary
Sylvia Benade : May 2025	May 2025 : Billing September 2025 : Billing September 2025 : Billing October 2025 : Clinical May 2025 : Billing; Letitia Kotze

- **Important:** Ensure the **for Team Summary** field links to **all records** with the same team and period, not just a single record.

linking only a single record for team feedback is insufficient. Verify team feedback grouping as described in [Check Team Feedback Grouping](#).

Check Who Has Submitted Reviews

- **View:** "Check who has submitted for given month & year"

- **Action:** Update filters to select the correct month and year.

The screenshot shows a Microsoft Dynamics 365 view interface. On the left, there's a sidebar with navigation options like 'Create new...', 'Find a view', and 'Manual Checks'. Under 'Manual Checks', several items are listed, including 'Ensure all records linked to Summary table', which is currently selected. Below this are 'More collaborative views' and 'EDITABLE' options. The main area displays a list of records with columns for 'Name : Month Year'. The first few records are: 1 Letitia Kotz : October 2025, 2 Corail de Wet : October 2025, 3 Corail de Wet : October 2025. At the top right, there are filtering and sorting tools, and a message indicating '18 hidden fields' and 'Filtered by Year, Month'. A 'Copy from another view' button is also present.

Check Team Feedback Grouping

- **View:** "Verify all -- team entries correctly grouped"
- **Expected Result:** The number of **linked records** in the `for Team Summary` field should be identical for all records within each subgroup (team/period).
- **If Not:**
 - Use the method in [Ensure All Fields Are Linked](#) for **Team Summary** to correct links.
- **Note:** The number of linked records may be less than the total number of submissions if individuals submit feedback for themselves, as they link to the same summary record as feedback from others.

The screenshot shows a Microsoft Dynamics 365 view interface. The sidebar includes 'Create new...', 'Find a view', and 'Manual Checks' with various items like 'Ensure all records linked to Summary table' and 'Verify all RECEPTIONISTS team entries correctly grouped'. The main area lists records with columns for 'Name : Month Year', 'Name of person you are giving feedback to', 'Team of person to...', and 'Month Year : Team Receiving Feedback'. The data shows multiple entries for June 2025, July 2025, August 2025, and September 2025, with names like Deldre van Eck, Angie Bekker, and Melissa Stanley appearing in both columns. A filter bar at the top is set to 'Filtered by Team of person to whom feedback is being given' and 'Grouped by 2 fields'. The view contains 14 hidden fields.

Quarterly Full Team Retro Table

Ensure All Fields Are Linked

- **View:** "Ensure all records linked to Summary table"

- **Expected Result:** The view should be empty.

The screenshot shows a Microsoft Dynamics 365 view titled "Quarterly Full Team Retro". The view interface includes a toolbar with various icons and a status bar at the bottom. The main area displays a single record with fields like "Name : Team", "Year : Quarter", and "for Team Summary". A sidebar on the left contains a tree view of collaborative views, with "Check who has submitted for given month & year" selected. The status bar at the bottom right shows "All records are filtered".

- **If Not Empty:**

- Copy and paste (or drag):
 - From Year : Quarter : Team to for Team Summary .
 - From Year : Quarter : Organization to for Organisational Summary .

Check Who Has Submitted Reviews

- **View:** "Check who has submitted for given month & year"
- **Action:** Update filters to select the correct month and year.

The screenshot shows a Microsoft Dynamics 365 view titled "Quarterly Full Team Retro". The view interface includes a toolbar with various icons and a status bar at the bottom. The main area displays a single record with fields like "Name : Team", "Year : Quarter", and "for Team Summary". A modal window titled "In this view, show teams" is open, showing a complex filter condition: "Where Year is 2025 and Quarter is October - December". The status bar at the bottom right shows "All records are filtered".

Configuring Dropdowns

Year Dropdown Limitation

The **Year** field in forms for **Monthly Team Retro**, **Monthly 360 Feedback**, and **Quarterly Team Retro** has limited options (up to 2030) and must be manually updated as needed.

Steps to Update

1. Add new year options to the **Year** field in the relevant tables if needed.
2. Update the following forms to include the new year:

MOVE Orthopaedics MONTHLY Team Retro

MOVE Orthopaedics MONTHLY Team Feedback

Team QUARTERLY Retro & Feedback Form

3. Optionally, hide older year options to streamline the dropdown.

The screenshot shows a form builder interface. At the top, there's a 'Name' field with a red asterisk indicating it's required. Below it is a '+ Add' button. The main focus is a 'Year' dropdown field. To the left of the dropdown is a modal titled 'Select options to show' with the sub-instruction: 'The form field will show only the selected options.' Inside the modal, there's a search bar and a list of years from 2024 to 2027. The years 2025, 2026, and 2027 are selected, while 2024 is not. At the bottom of the modal are 'Cancel' and 'Use selected options' buttons, with 'Use selected options' being highlighted in blue. To the right of the dropdown, there are settings for 'Show field as' (Dropdown or List), 'Limit selection to specific options (2 options selected)' (with 'Change selected options' and 'Show field only when conditions are met' as alternatives), and a note that the field is 'Required'. Below the dropdown, there's a 'Month' field with a red asterisk, followed by the placeholder text '(Remember this is the month you are giving feedback for)'.

the Year field cannot be derived from the Date Created field because feedback may be submitted in a different period (e.g., January 2026 feedback for December 2025)

Name Dropdown Selection

To update the names available in form dropdowns, refer to [Updating Team Structure](#).

Updating Team Structure

The **Team Structure** table requires manual updates when team composition changes. Use the **Use to Make Alterations** view in the **Team Structure** table for all updates.

Adding New Team Members

1. Navigate to the **Add New Team Member** view.
2. Add the member's name to the **Team Members Name** field.
3. Specify their **Team(s)**.
4. Define their **Participants Involvement** (e.g., which forms they appear in).

5. Ensure the **Active Member** field is set to "Yes" to include them in the **Active Participants** view, which populates form dropdowns.

A screenshot of a software interface showing a dropdown menu under 'Active Participants'. The menu items are 'Monthly 360 Feedback', 'Monthly Full Team Retro', and 'Quarterly Full Team'.

 the **Active Participants** view filters names for dropdowns in forms, ensuring only active members are selectable.

Removing Team Members

1. Navigate to the **Update Active Team Members** view.
2. Set the **Active Member** field to "No" to exclude the member from form dropdowns (via the **Active Participants** view).
 - **Note:** This does not delete the member from the table, only removes them from dropdowns.

Re-Adding a Previous Team Member

1. Navigate to the **Reactivate Previous Team Member** view.
2. Verify or update the member's **Team(s)** and **Participants Involvement**.
3. Set the **Active Member** field to "Yes" to include them in form dropdowns.

Updating Team or Participation

1. Navigate to the **Update Active Team Members** view.
2. Modify the **Team(s)** or **Participants Involvement** fields as needed.

End of Document

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