

Airtable README Maintenance Guide - Move Orthopeadics 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.
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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 populate **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

+ Create new...

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

10

TEAM RECEIVING FEE:

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 FEE:

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 FEE:

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 FEE:

Reception

3

8

August 2025 ...

August 2025

Team Name: Angie Bekker...

Team Feedback PDF

9

August 2025 ...

August 2025

Team Name: Delide van Eck...

Team Feedback PDF

10

August 2025 ...

August 2025

Team Name: Melissa Stanley...

Team Feedback PDF

MONTH YEAR

3

July 2025

TEAM RECEIVING FEE:

Individual-Specific Views

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

[illegible]

Holistic Overview

- | | | A Month Year : Team : Team Member | Year | Month | Holistic Feedback (Team - Specific) | Create Holistic PDF | Done |
|--|--|--|------|-----------|---|-----------------------|------|
| | | INDIVIDUAL RECEIVING FEEDBACK | | | | | |
| | | Angeline Bekker 2 | | | | | |
| | | 1 July 2025 : Reception : Angeline Bekker | 2025 | July | Your team feedback indicates a strong appreciation for... | Holistic Feedback PDF | |
| | | 2 May 2025 : Reception : Angeline Bekker | 2025 | May | Your team feedback indicates that you are highly value... | Holistic Feedback PDF | |
| | | INDIVIDUAL RECEIVING FEEDBACK | | | | | |
| | | Angie Bekker 2 | | | | | |
| | | 3 August 2025 : Reception : Angie Bekker | 2025 | August | | Holistic Feedback PDF | |
| | | 4 September 2025 : Reception : Angie Bekker | 2025 | September | Your team feedback indicates that your resilience... | Holistic Feedback PDF | |
| | | INDIVIDUAL RECEIVING FEEDBACK | | | | | |
| | | Brethia Groenewald 1 | | | | | |
| | | 5 June 2025 : Reception : Brethia Groenewald | 2025 | June | Your team feedback indicates that you are highly value... | Holistic Feedback PDF | |
| | | INDIVIDUAL RECEIVING FEEDBACK | | | | | |
| | | Coral de Wet 3 | | | | | |
| | | 6 July 2025 : Clinical : Coral de Wet | 2025 | July | Your team feedback indicates that you are highly value... | Holistic Feedback PDF | |
| | | 7 May 2025 : Clinical : Coral de Wet | 2025 | May | Your team feedback indicates that your strong... | Holistic Feedback PDF | |
| | | 8 October 2025 : Clinical : Coral de Wet | 2025 | October | Your team feedback indicates that your proactive suppo... | Holistic Feedback PDF | |
| | | INDIVIDUAL RECEIVING FEEDBACK | | | | | |
| | | Deidre van Eck 4 | | | | | |
| | | 9 August 2025 : Reception : Deidre van Eck | 2025 | August | Your team feedback indicates that your consistent... | Holistic Feedback PDF | |
| | | 10 June 2025 : Reception : Deidre van Eck | 2025 | June | Your team feedback indicates that you are highly value... | Holistic Feedback PDF | |
| | | 11 May 2025 : Reception : Deidre van Eck | 2025 | May | Your team feedback indicates that you are highly value... | Holistic Feedback PDF | |
| | | 12 September 2025 : Reception : Deidre van Eck | 2025 | September | Your team feedback indicates that your eagerness to... | Holistic Feedback PDF | |

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:

- 1. for Organisational Summary field is populated with the value from Month Year : Organization
creates a new record in the Monthly Full Team Retro: Summarytable 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

getting to know you Monthly Full Team Retro Monthly Full Team Retro Summary Monthly 360 Feedback Monthly 360 Feedback Summary Quarterly Full Team Retro Quarterly Full Team Retro Summary 1 hidden table + Tool									
11 hidden fields Filtered by Month Year: Team Grouped by 1 field LT Sorted by 1 field Color IT Share and sync									
Billing Team Create new... Find a view Team Specific Organizational Alternative Views More collaborative views									
YEAR: 2025 MONTH: 6 Team Specific Feedback Retro Done Team Specific PDF Individuals who have submitted their forms for this month (team)									
1 June 2025 June Billing The Billing team reported a positive and productive ... Monthly Team Retro Letitia Kotze, Sylvia Bernade									
2 May 2025 May Billing The Billing team reported a generally positive morale, with ... Monthly Team Retro Sylvia Bernade, Letitia Kotze									
3 July 2025 July Billing Required field(s) are empty or unavailable Monthly Team Retro									
4 August 2025 August Billing The Billing team reported a generally positive sentiment, ... Monthly Team Retro Letitia Kotze, Sylvia Bernade									
5 September 2025 September Billing Monthly Team Retro Sylvia Bernade									
6 October 2025 October Billing The Billing team demonstrated a strong commitment to ... Monthly Team Retro Letitia Kotze									

Use the "Organizational" view

for a given period

getting to know you | Monthly Full Team Retro | Monthly Full Team Retro Summary | Monthly 360 Feedback | Monthly 360 Feedback: Summary | Quarterly Full Team Retro | Quarterly Full Team Retro: Summary | 1 hidden table | Tools

Move Orthopaedics | 11 hidden fields | Filtered by Month Year: Team | Grouped by 1 field | 17 Sorted by 1 field | Color | Share and sync

+ Create new...
Q Find a view

Team Specific

Billing Team
Reception Team
Clinical Team
Doctors Team

Organizational

Move Orthopaedics

Alternative Views

by Year by Month
by Team

More collaborative views

FULL VIEW
EDITABLE

YEAR	Month	%	Organizational Feedback Retro	Done	Organizational PDF	Individuals who have submitted their forms for this month (eng)
2024	February	4	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...		Monthly Organizational Retro	Taneal Govender, Proud, Fatima, Adinda Marx, Aubrey Rakuba, Hugh Moswazi, Magdeleine Mahlangu, Blantina Mabotsele
	March	5	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...		Monthly Organizational Retro	Nonhlanhla Mpongo
	June	6	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...		Monthly Organizational Retro	Hugh Moswazi, Proud, Magdeleine Mahlangu, Aubrey Rakuba, Fatima, Blantina Mabotsele, Taneal Govender, Adinda Marx, Nonhlanhla Mpongo
	September	7	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...		Monthly Organizational Retro	Proud, Aubrey Rakuba, Adinda Marx, Magdeleine Mahlangu, Fatima, Taneal Govender, Hugh Moswazi, Blantina Mabotsele, Nonhlanhla Mpongo
2025	May	8	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...		Monthly Organizational Retro	Waldri Wever, Deidre van Eck, Melissa Stanley, Sylvia Bernade, Corail de Wet, Letitia Kotze, Maryka van Eyk, Angie Bekker, Stefan Wever
	June	9	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...		Monthly Organizational Retro	Deidre van Eck, Letitia Kotze, Maryka van Eyk, Sylvia Bernade, Angie Bekker, Melissa Stanley, Johann Groenewald, Brethia Groenewald
	July	10	Full Organisation Summary The monthly Retro feedback from Move Orthopaedics ...		Monthly Organizational Retro	Corail de Wet, Angie Bekker
	August	11	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...		Monthly Organizational Retro	Waldri Wever, Melissa Stanley, Corail de Wet, Letitia Kotze, Stefan Wever, Maryka van Eyk, Sylvia Bernade
	September	12	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...		Monthly Organizational Retro	Brethia Groenewald, Kelly Massyn, Deidre van Eck, Sylvia Bernade, Angie Bekker, Melissa Stanley
	October	13	Full Organisation Summary The collective feedback from Move Orthopaedics' monthly...		Monthly Organizational Retro	Letitia Kotze, Corail 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:

- 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:

1. 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	% Team Specific Feedback Retro	Team Specific PDF	Done
2025	April - June	1 2025: April - June: Clinical	The team consistently demonstrates strong communication...	Quarterly Team Retro	

Use the "Organizational" view

for a given period

YEAR	QUARTER	Team	% Organizational...	Create Organizational PDF	Done
2023	April - June	1 2023: April - June: Move Orthopaedics	The team demonstrated...	Quarterly Organizational Retro	
2023	January - March	2 2023: January - March: Move Orthopaedics	The team has demonstrate...	Quarterly Organizational Retro	
2023	July - September	3 2023: July - September: Move Orthopaedics	The team demonstrated...	Quarterly Organizational Retro	
2024	April - June	4 2024: April - June: Move Orthopaedics	The team demonstrated...	Quarterly Organizational Retro	
2024	January - March	5 2024: January - March: Move Orthopaedics	The team demonstrated...	Quarterly Organizational Retro	
2024	July - September	6 2024: July - September: Move Orthopaedics	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.

Name

Required ☒

Name

Add some help text

+ Add

☒ Limit record selection to a view

Monthly 360 Feedback View

Record selection will be limited to records from Monthly 360 Feedback View

☐ Show field only when conditions are met

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.

Name

Add some help text

+ Add

☒ Limit record selection to a view

Monthly Full Team Retro View

▼

ⓘ

Record selection will be limited to records from Monthly Full Team Retro View

☐ 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 Salesforce form configuration for a field named "Name". At the top, there are icons for a list, a dropdown menu, and the field name "Name" with a dropdown arrow. To the right, there is a "Required" toggle switch which is turned on, and an eye icon. Below this, the field label "Name" is displayed. Underneath the label is a text input area with the placeholder text "Add some help text". Below the input area is a button labeled "+ Add". A section with a light blue background contains a toggle switch labeled "Limit record selection to a view", which is turned on. Below this toggle is a dropdown menu showing "Quarterly Full Team View" with a dropdown arrow. Below the dropdown is a message: "Record selection will be limited to records from Quarterly Full Team View". At the bottom of this section is another toggle switch labeled "Show field only when conditions are met", which is turned off.

① 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

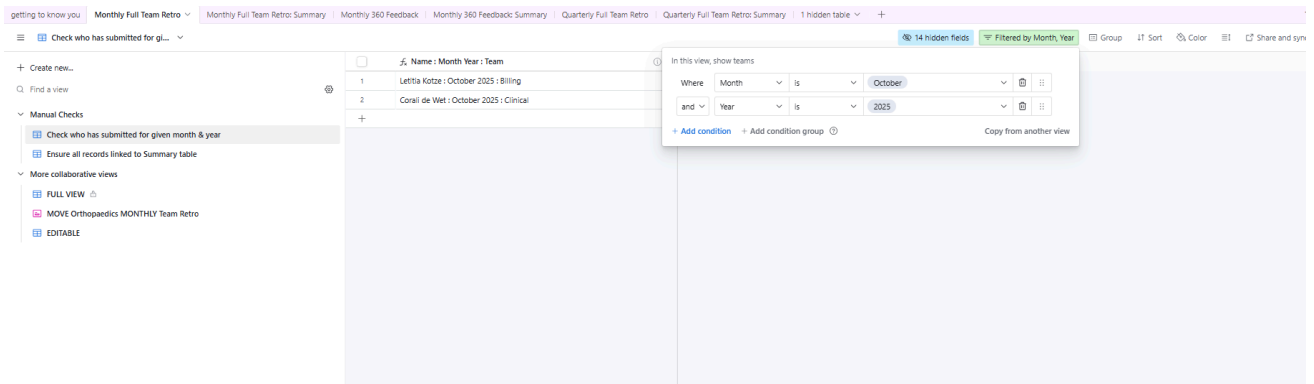
Use views under the **Manual Check** section to verify that records are correctly linked to their summary tables. If issues are found, manually correct them as described below.

🔥 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

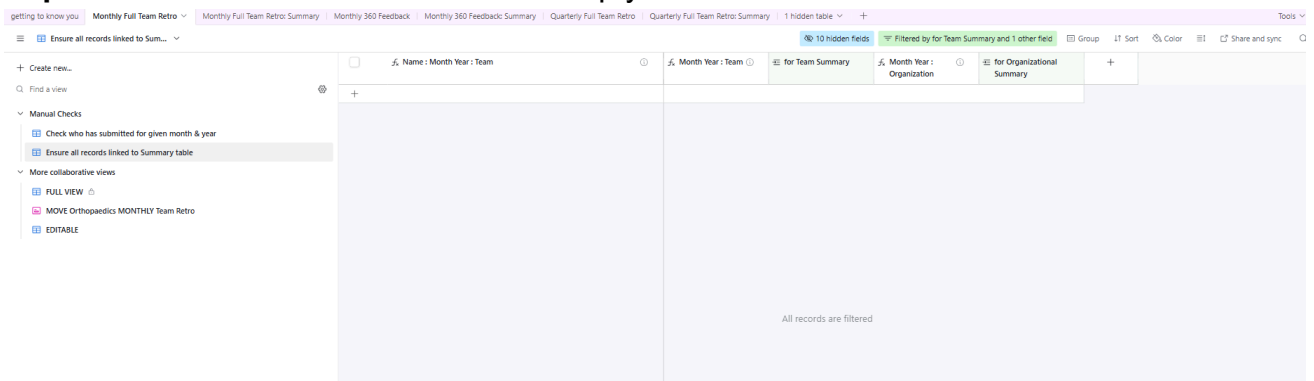
Check Who Has Submitted Reviews

- **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**.

The screenshot shows a table with columns: Name, Month Year, for Personal Summary, and for Team Summary. A filter is applied to the 'for Personal Summary' column, showing only records where this field is not empty. The table contains one visible row: 'Angie Bekker : June 2025'.

Name	Month Year	for Personal Summary	for Team Summary
Angie Bekker	June 2025	June 2025 : Billing : Sylvia Berade	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.

The screenshot shows a table with columns: Name, Month Year, for Personal Summary, and for Team Summary. A filter is applied to the 'for Team Summary' column. A modal dialog is open, showing a list of records to be linked to the 'for Team Summary' field. The records are: 'May 2025 : Billing : Letitia Kotze', 'May 2025 : Billing : Sylvia Berade', and 'May 2025 : Billing : Sylvia Berade'.

Name	Month Year	for Personal Summary	for Team Summary
Sylvia Berade	May 2025	May 2025 : Billing	
Sylvia Berade	September 2025	September 2025 : Billing	
Sylvia Berade	September 2025	September 2025 : Billing	
Coral de Vries	October 2025	October 2025 : Clinical	

- **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**.

18 hidden fields | Filtered by Year, Month

In this view, show feedback

Where: Month is October and Year is 2025

+ Add condition + Add condition group Copy from another view

Name : Month Year
1 Letitia Kotze : October 2025
2 Coral de Wet : October 2025
3 Coral de Wet : October 2025

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.

14 hidden fields | Filtered by Team of person to whom feedback is being given | Grouped by 2 fields

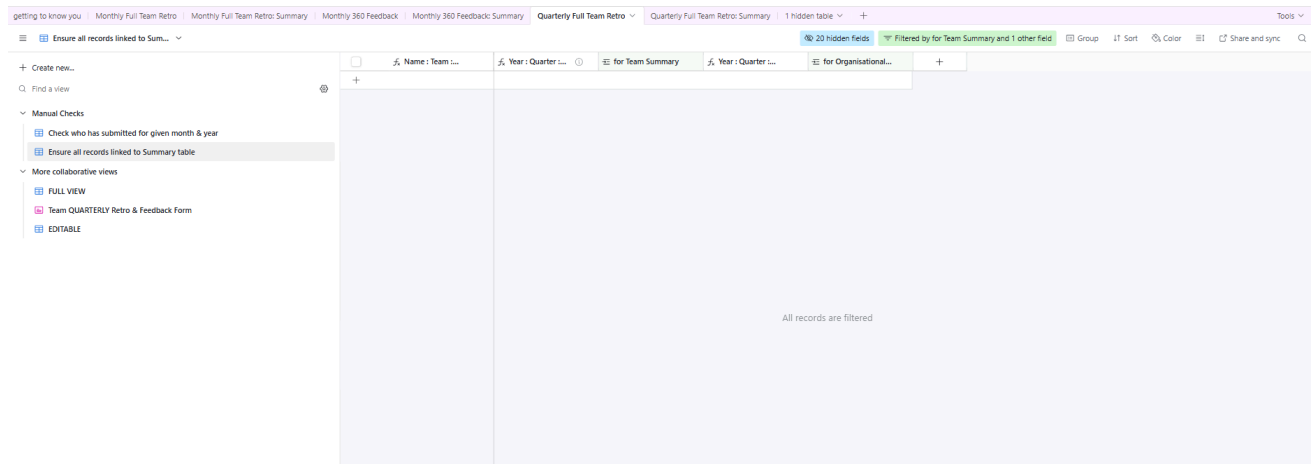
Name : Month Year	Name of person you are giving feedback to?	Team of person to...	Month Year : Team Receiving Feedback	for Team Summary
11 Sylvia Bernade : June 2025	Deidre van Eck	Reception	June 2025 : Reception	June 2025 : Reception : Waidi Wever Jun
12 Deidre van Eck : June 2025	Deidre van Eck	Reception	June 2025 : Reception	June 2025 : Reception : Waidi Wever Jun
13 Sylvia Bernade : June 2025	Deidre van Eck	Reception	June 2025 : Reception	June 2025 : Reception : Waidi Wever Jun
14 Melissa Stanley : June 2025	Melissa Stanley	Reception	June 2025 : Reception	June 2025 : Reception : Waidi Wever Jun
+ MONTH July 1				
15 Angie Bekker : July 2025	Angie Bekker	Reception	July 2025 : Reception	July 2025 : Reception : Angeline Bekker
+ MONTH August 3				
16 Maryka van Eyk : August 2025	Angie Bekker	Reception	August 2025 : Reception	August 2025 : Reception : Angie Bekker
17 Coral de Wet : August 2025	Deidre van Eck	Reception	August 2025 : Reception	August 2025 : Reception : Angie Bekker
18 Melissa Stanley : August 2025	Melissa Stanley	Reception	August 2025 : Reception	August 2025 : Reception : Angie Bekker
+ MONTH September 5				
19 Deidre van Eck : September 2025	Angie Bekker	Reception	September 2025 : Reception	September 2025 : Reception : Angie Bekke
20 Angie Bekker : September 2025	Angie Bekker	Reception	September 2025 : Reception	September 2025 : Reception : Angie Bekke
21 Angie Bekker : September 2025	Melissa Stanley	Reception	September 2025 : Reception	September 2025 : Reception : Angie Bekke
22 Melissa Stanley : September 2025	Melissa Stanley	Reception	September 2025 : Reception	September 2025 : Reception : Melissa Stan
23 Melissa Stanley : September 2025	Deidre van Eck	Reception	September 2025 : Reception	September 2025 : Reception : Melissa Stan

Quarterly Full Team Retro Table

Ensure All Fields Are Linked

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

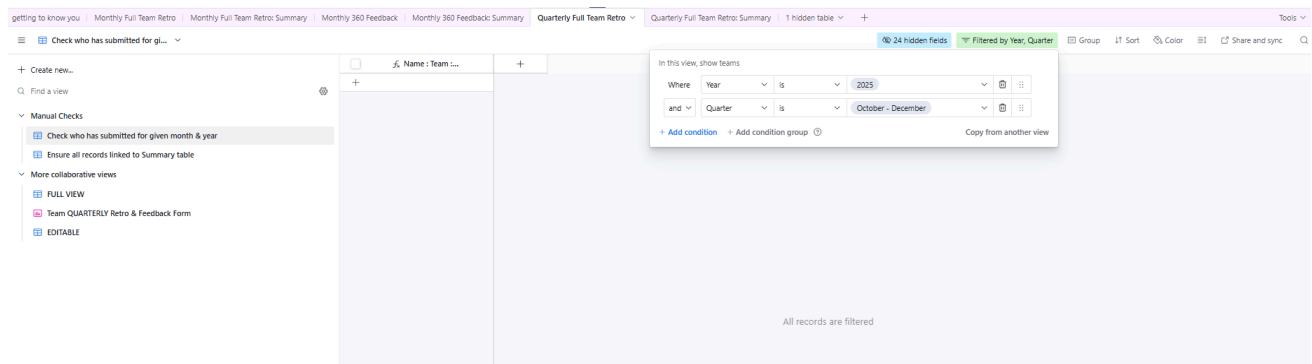
- **Expected Result:** The view should be empty.



- **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**.



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 configuration interface. A modal titled "Select options to show" is open, displaying a list of years: 2024, 2025, 2026, and 2027. The 2025 and 2026 options are selected. The modal includes a search bar, "Select all", "Clear all", "Cancel", and "Use selected options" buttons. The background form shows the "Year" field with a dropdown arrow, a "Required" toggle, and a "Show field as" dropdown set to "Dropdown".

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.



 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

Last Updated: 13 November 2025