Airtable README - Move Orthopeadics 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

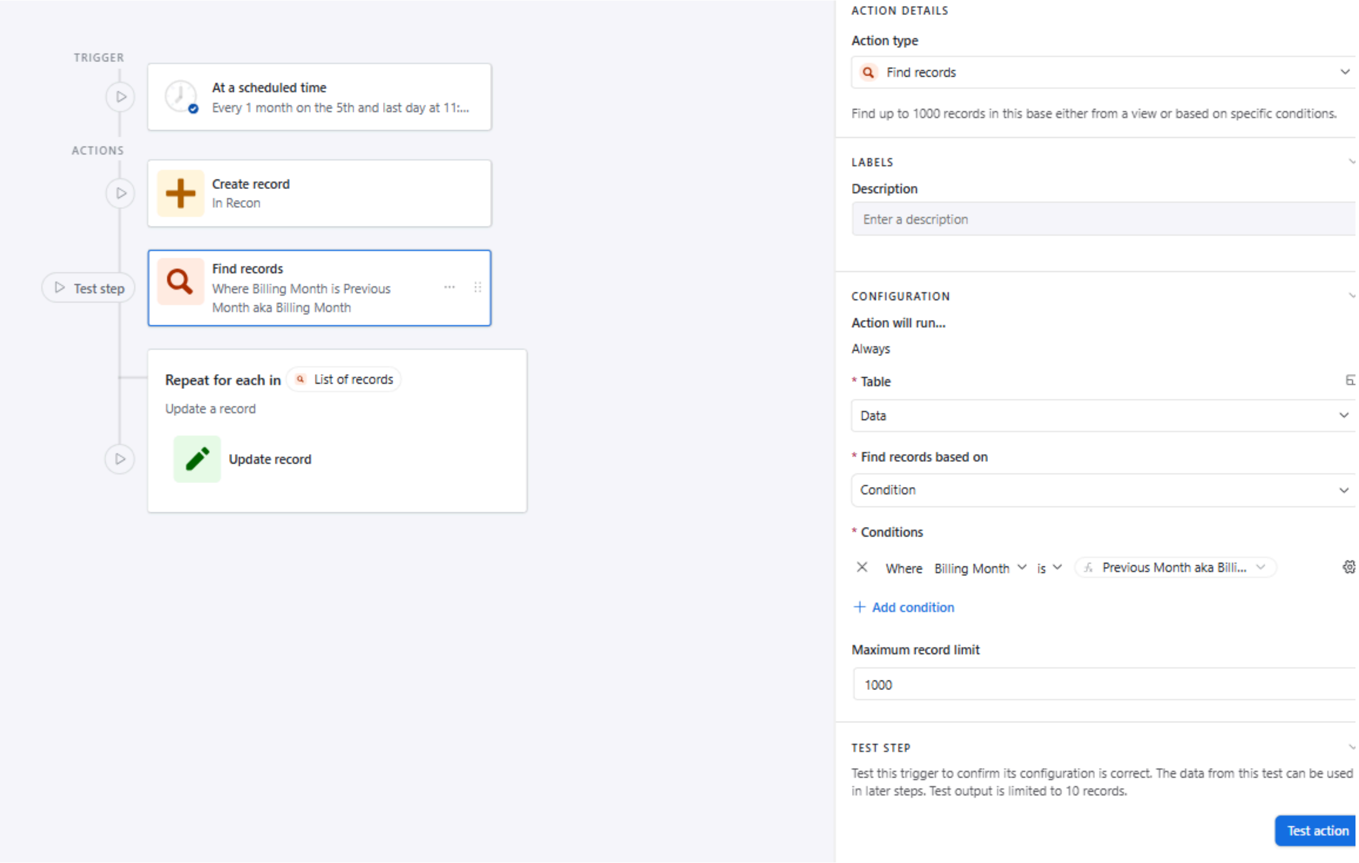
Type: Formula
Description: used in automation for future Recon updates to group all records from previous month in Data sheet into same Recon sheet record **running 12th of every month**

```
DATETIME_FORMAT(

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

  'MMMM'

)
```



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 aka Billing Month

Repeat for each in List of records
Update a record

Update record

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 Billi...

Maximum record limit: 1000

TEST STEP

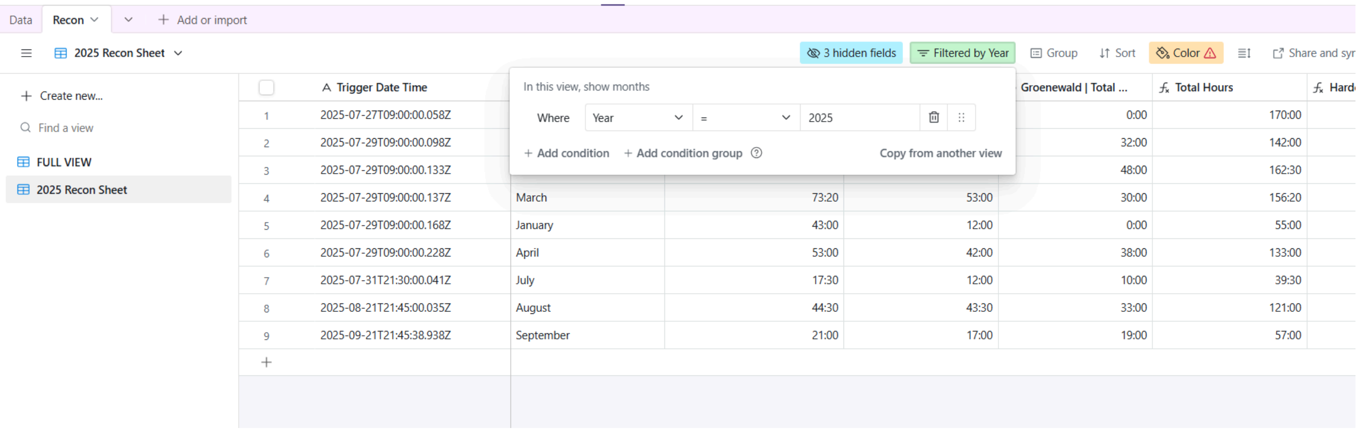
Test this trigger to confirm its configuration is correct. The data from this test can be used in later steps. Test output is limited to 10 records.

Year

Type: Formula

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

used to generate a view



In this view, show months

Where Year = 2025

+ Add condition + Add condition group Copy from another view

	Trigger Date Time				Groenewald | Total ...	Total Hours	Hard
1	2025-07-27T09:00:00.058Z				0:00	170:00	
2	2025-07-29T09:00:00.098Z				32:00	142:00	
3	2025-07-29T09:00:00.133Z				48:00	162:30	
4	2025-07-29T09:00:00.137Z	March	73:20	53:00	30:00	156:20	
5	2025-07-29T09:00:00.168Z	January	43:00	12:00	0:00	55:00	
6	2025-07-29T09:00:00.228Z	April	53:00	42:00	38:00	133:00	
7	2025-07-31T21:30:00.041Z	July	17:30	12:00	10:00	39:30	
8	2025-08-21T21:45:00.035Z	August	44:30	43:30	33:00	121:00	
9	2025-09-21T21:45:38.938Z	September	21:00	17:00	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

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

Format: duration (h:mm)

Hardcastle | Total Hours

Type: Formula

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

Format: duration (h:mm)

Wever | Total Hours

Type: Formula

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

Format: duration (h:mm)

Groenewald | Total Hours

Type: Formula

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

Format: duration (h:mm)

Wever | Proportion

Type: Formula

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

Format: duration (h:mm)

Groenewald | Proportion

Type: Formula

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

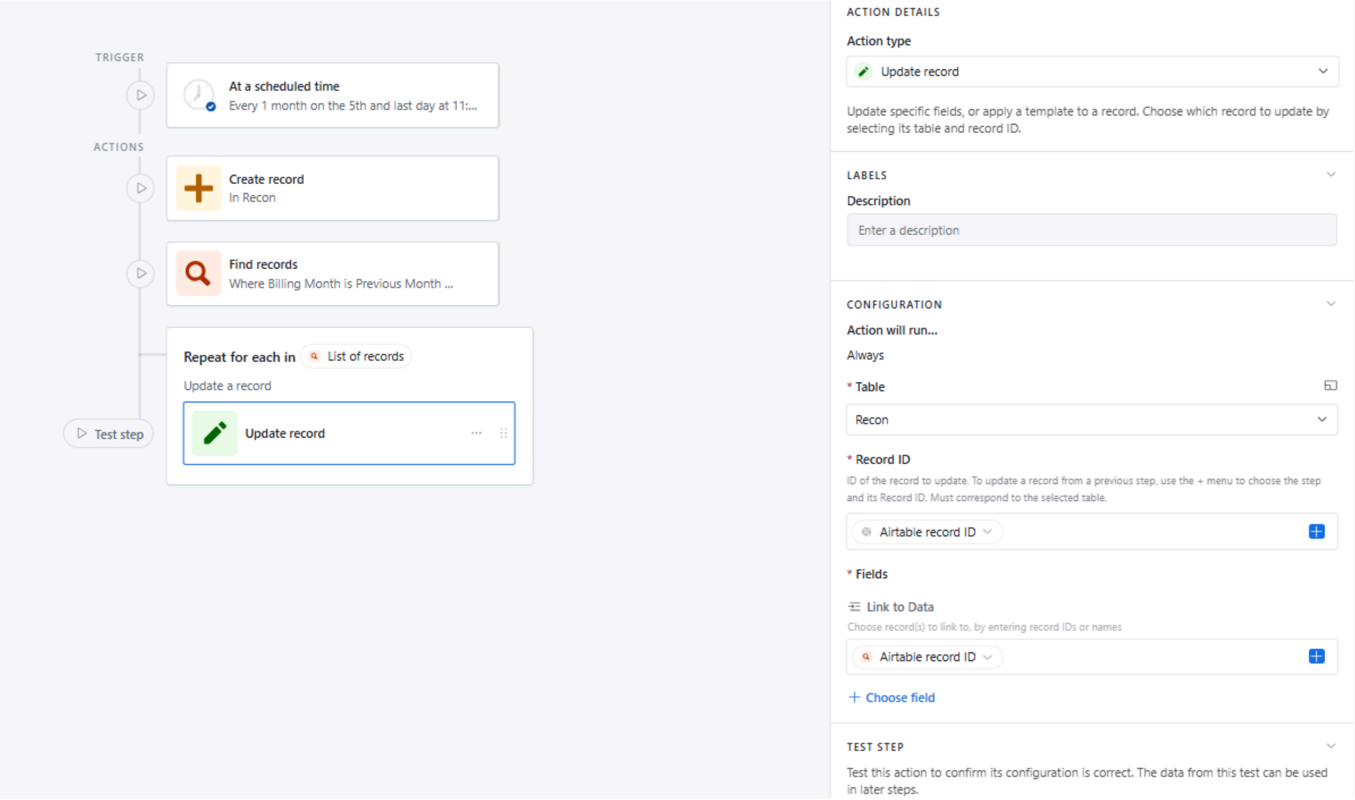
Timesheet Form

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

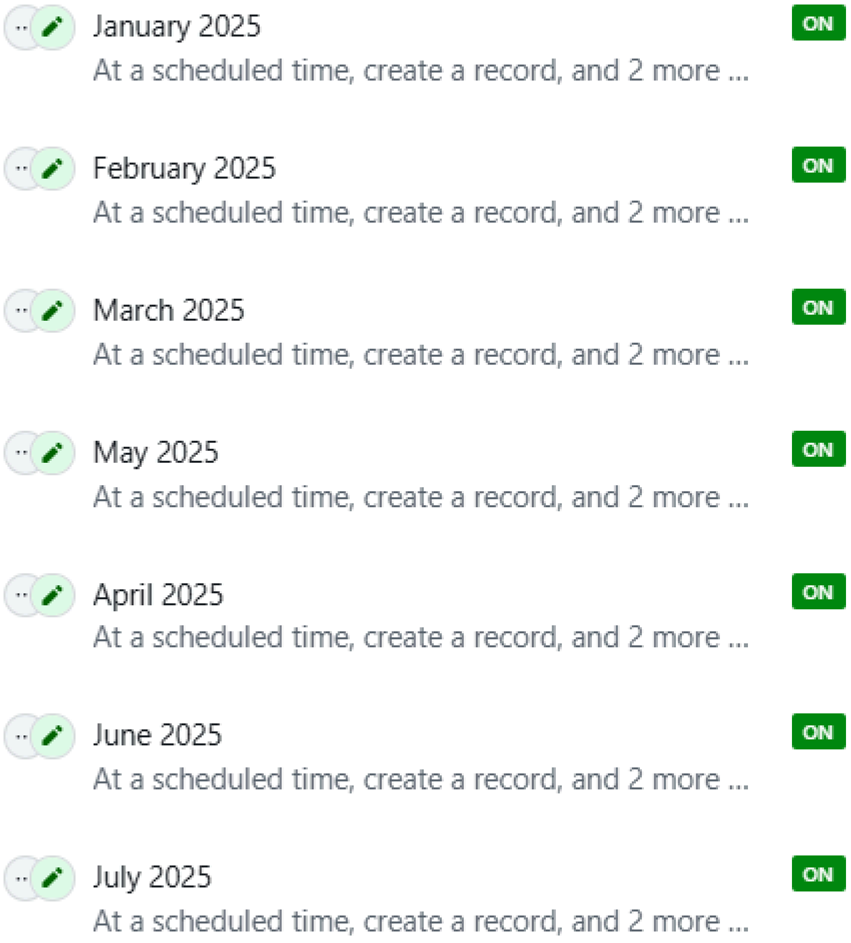
+ Choose field

TEST STEP

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

set to trigger on 12th of every month

for back-dated Recon updates



January 2025 ON
At a scheduled time, create a record, and 2 more ...

February 2025 ON
At a scheduled time, create a record, and 2 more ...

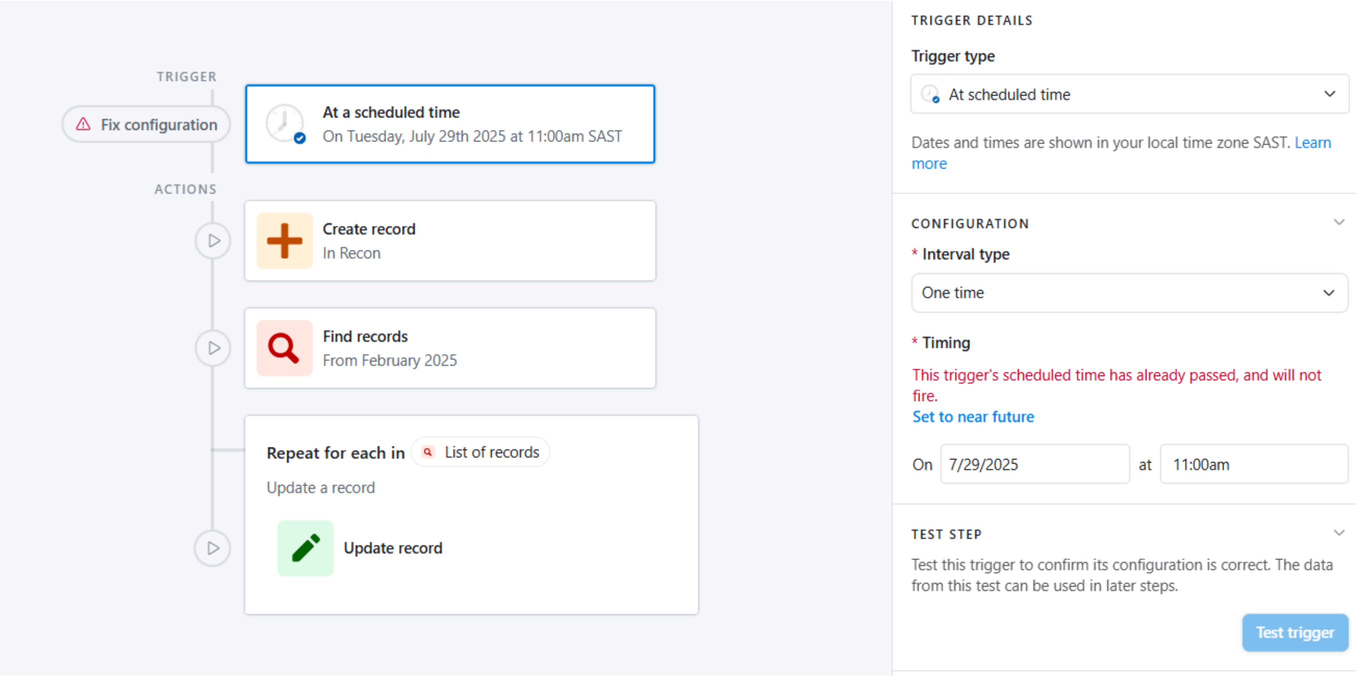
March 2025 ON
At a scheduled time, create a record, and 2 more ...

May 2025 ON
At a scheduled time, create a record, and 2 more ...

April 2025 ON
At a scheduled time, create a record, and 2 more ...

June 2025 ON
At a scheduled time, create a record, and 2 more ...

July 2025 ON
At a scheduled time, create a record, and 2 more ...



TRIGGER

Fix configuration

At a scheduled time
On Tuesday, July 29th 2025 at 11:00am SAST

ACTIONS

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

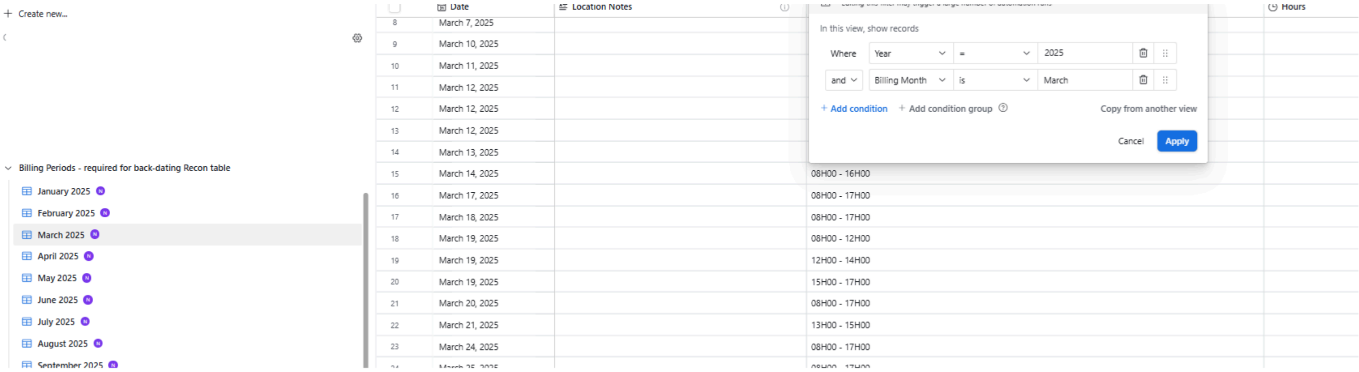
On 7/29/2025 at 11:00am

TEST STEP

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

set trigger at specific time

use **personal** views in Data as filter for records to be linked to given record in Recon



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

and Billing Month is March

End of Document

Last updated: November 14, 2025