

Airtable README Maintenance Guide - Move Orthopedics Timesheets for v1 & v2

This document outlines procedures for managing errors, late data submissions, and complications in the Airtable base, particularly related to the **Recon** sheet and **Billing Month** synchronization. Automations are configured to execute on the **21st of each month**. Data entered after this date requires manual intervention to ensure accurate linking and reconciliation.

Key Automation Behavior

- **Primary Automation Trigger:** Runs on the **21st of each month** to populate the **Recon** sheet for the current **Billing Month**.
- **Late Data Submission:**
 - Records created **after the 21st** for a prior **Billing Month** will **not** be automatically included in that month's Recon entry.
 - These must be **manually linked** using the procedures below.

Note: Earlier manual update methods (pre-v4/v5) are **deprecated** due to inconsistent user compliance.

Current System Design (v4 & v5)

| Component | Configuration |
|------------------------------|---|
| Billing Month Field | = Calendar Month |
| Recon Record Creation | Automation triggers on 5th day of next month to create Recon record and link all existing records from previous month in Data |

Pre-Reconciliation Checklist

Before performing reconciliation on the **Recon** sheet:

1. Verify all data is linked to the correct Recon record.
2. Check the MANUAL INTERVENTION – red view for red-flagged entries.
3. Manually link any unlinked records by matching Billing Month.

Example: Problem (Requires Action)

MANUALLY FIX RECON - red

| | Date | Billing Month | Link to Recon | Date Created | Is Manual... |
|-----|-------------------|---------------|--------------------------|--------------|--------------|
| 260 | August 18, 2025 | August | | 9/7/2025 | Yes |
| 261 | August 18, 2025 | August | | 9/7/2025 | Yes |
| 262 | August 19, 2025 | August | | 9/7/2025 | Yes |
| 263 | August 20, 2025 | August | | 9/7/2025 | Yes |
| 264 | August 20, 2025 | August | | 9/7/2025 | Yes |
| 265 | August 21, 2025 | August | | 9/7/2025 | Yes |
| 266 | August 22, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 267 | August 25, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 268 | August 25, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 269 | August 25, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 270 | August 26, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 271 | August 27, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 272 | August 27, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 273 | August 28, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 274 | August 29, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 275 | September 1, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 276 | September 1, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 277 | September 1, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 278 | September 1, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 279 | September 2, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 280 | September 2, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 281 | September 3, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 282 | September 3, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 283 | September 4, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |
| 284 | September 5, 2025 | September | 2025-09-21T21:47:01.591Z | 9/7/2025 | No |

Red entries in MANUAL INTERVENTION – red view indicate missing links. Link to correct Recon record using Billing Month.

Example: Not a Problem

| | Date | Billing Month | Link to Recon | Date Created | Is Manual... |
|-----|------------------|---------------|--------------------------|--------------|--------------|
| 222 | October 13, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 223 | October 14, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 224 | October 15, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 225 | October 15, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 226 | October 15, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 227 | October 16, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 228 | October 17, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 229 | October 17, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 230 | October 20, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 231 | October 21, 2025 | October | 2025-10-21T21:45:05.406Z | 10/2/2025 | No |
| 232 | October 22, 2025 | November | | 10/2/2025 | No |
| 233 | October 22, 2025 | November | | 10/2/2025 | No |
| 234 | October 22, 2025 | November | | 10/2/2025 | No |
| 235 | October 23, 2025 | November | | 10/2/2025 | No |
| 236 | October 24, 2025 | November | | 10/2/2025 | No |
| 237 | October 27, 2025 | November | | 10/2/2025 | No |
| 238 | October 27, 2025 | November | | 10/2/2025 | No |
| 239 | October 28, 2025 | November | | 10/2/2025 | No |
| 240 | October 29, 2025 | November | | 10/2/2025 | No |
| 241 | October 29, 2025 | November | | 10/2/2025 | No |
| 242 | October 29, 2025 | November | | 10/2/2025 | No |
| 243 | October 30, 2025 | November | | 10/2/2025 | No |
| 244 | October 31, 2025 | November | | 10/2/2025 | No |
| 245 | October 1, 2025 | October | 2025-10-21T21:45:05.406Z | 11/3/2025 | No |
| 246 | October 1, 2025 | October | 2025-10-21T21:45:05.406Z | 11/3/2025 | No |
| | + Add... 2025 | October | 2025-10-21T21:45:05.406Z | 11/3/2025 | No |

The "Link to Recon" field may be empty if the Recon record has not yet been created — this is expected behavior.

Handling Missing Data in Recon Sheet

Scenario

A record is created **after the 21st** for a **previous Billing Month**.

Example

Date Created: November 2025

Billing Month: October 2025

| Date | Billing Month | Date Created |
|------------------|---------------|--------------|
| October 27, 2025 | November | 10/2/2025 |
| October 27, 2025 | November | 10/2/2025 |
| October 28, 2025 | November | 10/2/2025 |
| October 29, 2025 | November | 10/2/2025 |
| October 29, 2025 | November | 10/2/2025 |
| October 29, 2025 | November | 10/2/2025 |
| October 30, 2025 | November | 10/2/2025 |
| October 31, 2025 | November | 10/2/2025 |
| October 1, 2025 | October | 11/3/2025 |
| October 1, 2025 | October | 11/3/2025 |
| October 1, 2025 | October | 11/3/2025 |
| October 2, 2025 | October | 11/3/2025 |
| October 3, 2025 | October | 11/3/2025 |
| October 3, 2025 | October | 11/3/2025 |
| October 6, 2025 | October | 11/3/2025 |
| October 7, 2025 | October | 11/3/2025 |
| October 8, 2025 | October | 11/3/2025 |
| October 8, 2025 | October | 11/3/2025 |
| October 8, 2025 | October | 11/3/2025 |
| October 9, 2025 | October | 11/3/2025 |
| October 9, 2025 | October | 11/3/2025 |
| October 10, 2025 | October | 11/3/2025 |

Result: The October Recon automation (run on Oct 21) has already executed → **no data pulled** → **manual linking required.**

Procedure: Manually Link Data to Recon Sheet

Step-by-Step

1. Navigate to View: MANUALLY FIX RECON

Data ▾ Recon ▾ + Add or import

☰ MANUALLY FIX RECON 12 hic

| | Date | Billing Month | Recon | Total Hours | Date Created | + |
|---|--------------------------------------|-----------------|---------|-------------|----------------|---|
| + | Create new... | | #ERROR! | | 7:00 7/16/2025 | |
| Q | Find a view | | | | | |
| ⌄ | My personal views | | | | | |
| ⌄ | Maryka's Timesheet Form | | | | | |
| ⌄ | 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 ... | | | | | |
| | 1 | August 1, 2025 | August | | 2:00 9/4/2025 | |
| | 2 | August 4, 2025 | August | | 8:00 9/4/2025 | |
| | 3 | August 5, 2025 | August | | 8:00 9/4/2025 | |
| | 4 | August 6, 2025 | August | | 4:00 9/4/2025 | |
| | 5 | August 6, 2025 | August | | 2:00 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 | |

2. Filter by Billing Month:

- Select records with the target **Billing Month** (e.g., October 2025).

3. Locate or Create Recon Record:

- Go to the **Recon** table.
- Find the existing record for the **Billing Month** (created on 21st via automation).
- If missing (e.g., automation failed or month not yet processed): **Create a new Recon record manually.**

port

12 hidden fields Filtered

| | Date | Billing Month | Recon | Total Hours | Date Created | + |
|----|-----------------|---------------|---|-------------|----------------|---|
| 1 | | #ERROR! | | | 7:00 7/16/2025 | |
| | August 1, 2025 | August | +  | 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: July Billing Month: January Year: 2025
Link to Data: January 9, 2025 [Jar]

2025-07-29T09:00:00.228Z
Trigger Date Month: July Billing Month: April Year: 2025
Link to Data: March 24, 2025 [Mar]

2025-07-31T21:30:00.041Z
Trigger Date Month: July Billing Month: July Year: 2025
Link to Data: June 23, 2025 [June]

2025-08-21T21:45:00.035Z
Trigger Date Month: August Billing Month: August Year: 2025
Link to Data: August 1, 2025 [Aug]

4. Link All Matching Records:

- Copy the Recon record link.
 - Return to MANUALLY FIX RECON view.
 - Paste the link into the "Link to Recon" field for **all records** with matching **Billing Month**.
-

| <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 checked="" type="checkbox"/> e | 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 | Auast 25, 2025 | September | | 8:00 | 9/4/2025 | |

5. Verify:

- Confirm no red flags remain in MANUAL INTERVENTION – red .
 - Ensure Recon totals reflect updated linked records.
-

Troubleshooting Quick Reference

| Issue | Indicator | Resolution |
|-----------------------|-------------------------------------|------------------------|
| Data missing in Recon | No linked records for Billing Month | Use MANUALLY FIX RECON |
| Red flags in view | MANUAL INTERVENTION – red | Link by Billing Month |

| Issue | Indicator | Resolution |
|----------------------------|--------------------|--------------------------------|
| Recon record missing | No entry for month | Create manually in Recon table |
| Late entry not auto-linked | Created after 21st | Manual link required |

End of Document

Last Updated: November 05, 2025