

Airtable README Maintenance Guide - Move Orthopedics Team Feedback for v4 & v5

This document outlines the usage and management of the Airtable base for processing employee timesheet logs, reconciling them against the "Recon" sheet, and handling late submissions via automation and manual intervention. The process ensures accurate calculations while accounting for submission deadlines.

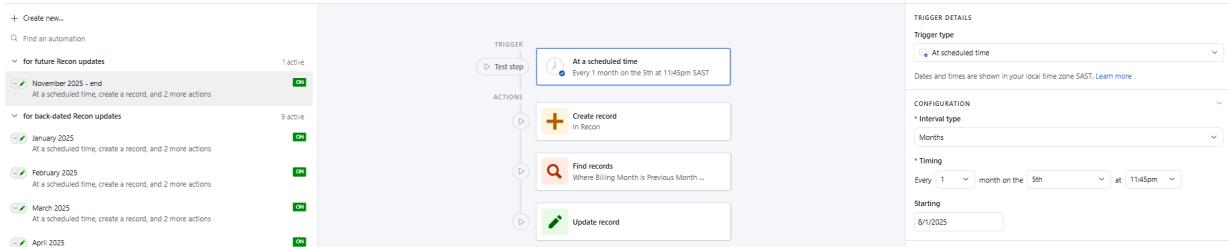
Key Field: Date Created

- **Purpose:** Tracks when a timesheet record is submitted.
- **Usage in Compliance:**
 - Submissions must occur **before the 5th of the following month**.
 - Late entries (after the 5th) are excluded from automated processing.
 - The **Date Created** field provides **defensible evidence** for excluding late records from calculations.

Note: This mechanism was introduced in **v3** due to repeated late submissions in **v1** and **v2** that disrupted automation.

Automation Trigger Configuration

- **Default Run Date:** 5th of each month (processes prior month's data).
- **Customization:**
 - To allow more submission time (e.g., until the 10th), adjust the trigger here:



Handling Late Submissions (Manual Linking)

Step 1: Identify Late Records

Use the view:

"Manually link (red) records submitted too late!"

- Late records are highlighted with **red bars**.
- Example:

	Date	Billing Month	Link to Recon	Date Created	Is Manual...
258	October 13, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
259	October 14, 2025	October		11/6/2025	Yes
260	October 15, 2025	October		11/6/2025	Yes
261	October 15, 2025	October		11/6/2025	Yes
262	October 15, 2025	October		11/6/2025	Yes
263	October 16, 2025	October		11/6/2025	Yes
264	October 17, 2025	October		11/6/2025	Yes
265	October 17, 2025	October		11/6/2025	Yes
266	October 20, 2025	October		11/6/2025	Yes
267	October 21, 2025	October		11/6/2025	Yes
268	October 22, 2025	October		11/6/2025	Yes
269	October 22, 2025	October		11/6/2025	Yes
270	October 22, 2025	October		11/6/2025	Yes
271	October 23, 2025	October		11/6/2025	Yes
272	October 24, 2025	October		11/6/2025	Yes
273	October 27, 2025	October		11/6/2025	Yes
274	October 28, 2025	October		11/6/2025	Yes
275	October 29, 2025	October		11/6/2025	Yes
276	October 29, 2025	October		11/6/2025	Yes
277	October 29, 2025	October		11/6/2025	Yes
278	October 30, 2025	October		11/6/2025	Yes
279	October 31, 2025	October		11/6/2025	Yes

Records submitted on 6th November for October — missed automation cutoff.

Step 2: Manual Linking Process

1. Open the "Recon" sheet.

2. Locate the corresponding recon record:

	October 14, 2025	October
260	October 15, 2025	October
261	October 15, 2025	October
262	October 15, 2025	October
263	October 16, 2025	October
264	October 17, 2025	October
265	October 17, 2025	October
266	October 20, 2025	October
267	October 21, 2025	October
268	October 22, 2025	October
269	October 22, 2025	October
270	October 22, 2025	October
271	October 23, 2025	October
272	October 24, 2025	October
273	October 27, 2025	October

11/6/2025 Yes

Search April 2025 April 4, 2025

2025-11-06T08:40:00.110Z
Previous Month aka Billi... Year
October 2025

2025-08-06T09:00:00.069Z
Previous Month aka Billi... Year
July 2025

2025-06-06T09:00:00.055Z
Previous Month aka Billi... Year
May 2025

2025-10-06T09:21:00.039Z
Previous Month aka Billi... Year
May 2, 2025 May 5 Hardcastle | Total Hours
72:00

Link to Data Hardcastle | Total Hours

11/6/2025 Yes

3. Drag the link across all relevant fields:

	Date	Billing Month	Link to Recon	Date Created	Is Manual...
257	October 10, 2025	October	2025-11-06T08:40:00.110Z	11/3/2025	No
258	October 13, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
	October 14, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
260	October 15, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
261	October 15, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
262	October 15, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
263	October 16, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
264	October 17, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
265	October 17, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
266	October 20, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
267	October 21, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
268	October 22, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
269	October 22, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
270	October 22, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
271	October 23, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
272	October 24, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
273	October 27, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
274	October 28, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
275	October 29, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
276	October 29, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
277	October 29, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
278	October 30, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
279	October 31, 2025	October	2025-11-06T08:40:00.110Z	11/6/2025	No
	+				

Important Note:

The filter "Is Manual Intervention Required?" = Yes is **not applied** in this view.

This allows drag-linking functionality.

In this view, show records

Where Is Manual Int... is Yes

+ Add condition + Add condition group ⚡ Copy from another view

11 hidden fields Filtered by Is Manual Intervention Required ? Grouped by 2 fields

Verification: Are All Records Linked?

Use the view:

"Are there any entries not linked ?"

- Displays any unlinked records for quick audit.

Data ▾ Recon ▾ + Add or import

Are there any entries not linked ?

+ Create new...
Q Find a view
for back-dated Recon updates
Weekly Overview
Monthly Overview
More collaborative views
Manually link (red) records
Are there any entries not linked ?
FULL VIEW

Date Billing Month Link to Recon

In this view, show records

Where Is Manual Int... is Yes
or Link to Recon is empty

+ Add condition + Add condition group ⚡ Copy from another view

11 hidden fields Filtered by Link to Recon and 1 other field Grouped by 2 fields

All records are filtered

End of Document

Last updated: November 06, 2025