

Airtable README Maintenance Guide - Move Orthopeadics 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							16 h
	<input type="checkbox"/>	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

MANUALLY FIX RECON - red

+ Create new...

Find a view

My personal views

Maryka's Timesheet Form

Billing Periods - required for back-dating Recon table

Weekly Overview

Monthly Overview

More collaborative views

MANUALLY FIX RECON - red

FULL VIEW

Maryka's Timesheet Form - updated

More personal views

Maryka's Timesheet Form

	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 hidden fields

<input type="checkbox"/>	Date	Billing Month ⓘ	Recon	Total Hours	Date Created	
1		#ERROR!		7:00	7/16/2025	
2	August 1, 2025	August		2:00	9/4/2025	
3	August 4, 2025	August		8:00	9/4/2025	
4	August 5, 2025	August		8:00	9/4/2025	
5	August 6, 2025	August		4:00	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	

+

Create new...

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 Weber

Weekly Overview

Dr Groenewald

Monthly Overview

2025 Monthly Overview - by ...

2025 Monthly Overview - by ...

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**.

ort

12 hidden fields

Filtered

<input type="checkbox"/>	Date	Billing Month ⓘ	Recon	Total Hours	Date Created	
1		#ERROR!		7:00	7/16/2025	
<input type="checkbox"/>	August 1, 2025	August	<div><div>+</div></div>	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

Mr

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

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 type="checkbox"/>	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	August 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