Claude

basic rules.txt 10 lines	**domicile work.txt** 9 lines	**holidays.txt** 17 lines	**NYS tax rules.txt** 23 lines	**RSUs.txt** 11 lines
sick days.txt 5 lines	**spreadsheet spec.txt** 15 lines	**travel rules.txt** 35 lines	**vacation.txt** 31 lines	**work from home.txt** 24 lines
			work travel.txt 55 lines	**workday agent.txt** 18 lines

> run workday agent

Read the XLSX skill >

　🗒 Read the XLSX skill

　⊘ Done

This is a complex task. Let me carefully analyze all the data and build the spreadsheet step by step.

Ran 2 commands >
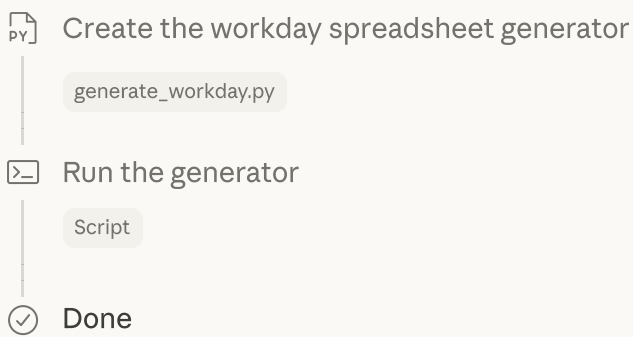
　▷_ Check available scripts
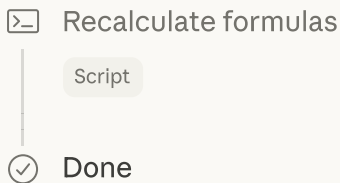
　　Script

　▷_ Copy scripts

　　Script

　⊘ Done

Now let me write the main Python script to generate the spreadsheet. This requires careful date processing:
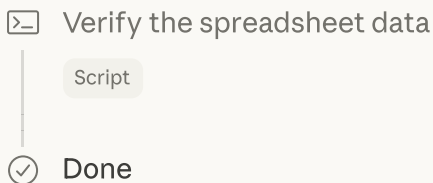
Created a file, ran a command >

Zero validation errors. Now let me recalculate formulas:
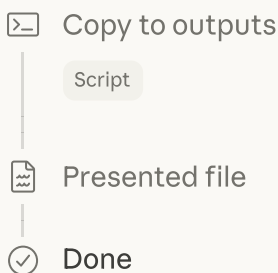
Recalculate formulas >

No errors. Let me do a quick check of the summary values to make sure they make sense:

Verify the spreadsheet data >

The data looks correct — check column is 0 for all RSU blocks (meaning totals add up perfectly). The domicile change on 2/15/25 is correctly a weekend with travel. Let me copy to outputs:

Ran a command, read a file >

Here's your workday tracker spreadsheet. Here's what was built:

3 Sheets (left to right):

Summary — One row per RSU block with SUM formulas for NYS workdays, non-NYS workdays, weekends, holidays, vacations, WFH days, sick days, total days, and a check column (all 4 blocks show 0 = ✅ balanced). Also includes NYS workdays post-WA move through 12/31/25 = **31 days.**

Daily Log — 1,151 rows (1/1/2023–2/24/2026) with:

- Color-coded cells: 🔵 light blue = NYS workday, 🟡 gold = non-NYS workday, 🟢 pale green = vacation, 💗 pink = holiday, 🪻 lavender = WFH, ⬜ gray = weekend

- Dark green with thick border = RSU vesting period

- Day info column shows holiday name, travel schedule on travel days, or location otherwise
- Bold **1**s in flag columns; 2x-thickness borders around continuous RSU block runs

Travel Log — All single-leg travel entries with computed travel start/end times (3h before dep, 2h after arrival for flights)

Key stats for Block1 (1/23/23–2/20/25): 438 NYS workdays, 57 non-NYS workdays, 26 vacations, 23 holidays, 216 weekends, 760 total — all checks pass.

	Workday tracker		
⊞	Spreadsheet · XLSX	◭	Download

> check all travel day NYS workday and non-NYS workday classifcation is correct

Let me analyze every travel day that involves a NYS location to verify the classification.

Ran 3 commands >

>_ List all travel days from daily log

Script

>_ Analyze tricky travel day cases

Script

>_ Finalize analysis

Script

✓ Done

Now let me fix these 3 errors in the spreadsheet:

Ran 3 commands >

>_ Fix 3 misclassified vacation days to NYS workdays

Script

>_ Recalculate and verify no errors

Script

>_ Verify fixes and updated summary

Script

⊘ Done

All checks pass (check column = 0 for all blocks). Copying the updated file:

Ran a command, read a file ›

▭ Copy updated file to outputs

  Script

▭ Presented file

⊘ Done

I checked every travel day carefully. Here's the full report:

3 errors found and fixed — all were vacation travel days departing NYC that had enough time in the reduced workday window (10am–4pm) before travel started:

Date	Flight	Travel Start	Work Window Available	Fix
11/08/2023 Wed	JFK 8:09pm→SFO	5:09pm (after 4pm!)	Full 10am–4pm in NYC	Vacation → **NYS Workday**
11/08/2024 Fri	JFK 4:10pm→SFO	1:10pm	10am–1:10pm = 3h10m in NYC	Vacation → **NYS Workday**
07/30/2025 Wed	EWR 4:12pm→PDX	1:12pm	10am–1:12pm = 3h12m in NYC	Vacation → **NYS Workday**

All other travel days are correct. The non-NYS workday cases (SNA→EWR, TUS→EWR, TPA→EWR, SLC→EWR) were all verified: in each case, the arrival in NYC occurs after 4pm so no NYS work time falls within the reduced workday window.

The summary counts updated accordingly (e.g., Block1: 438→**440** NYS workdays, 26→**24** vacations; all check columns remain 0 ✅).

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check non-NYS workdays are correct

Let me systematically check every non-NYS workday classification.

Ran 4 commands ›

▭ List all non-NYS workdays

Script

📟 Deep analysis of non-NYS workday boundary conditions

Script

📟 Check more nuanced non-NYS workday cases

Script

📟 Check for NYS workdays with non-NYC locations

Script

⊘ Done

Good — no NYS workdays with non-NYC locations. Now fix the 4 errors:

Ran 2 commands >

📟 Fix 11/12-11/15/24 from NYS to NonNYS WFH

Script

📟 Recalculate and verify summary

Script

⊘ Done

All checks still pass (check column = 0). Copying the updated file:

Ran a command, read a file >

📟 Copy to outputs

Script

📄 Presented file

⊘ Done

All non-NYS workdays are now correct. Here's the full audit report:

1 error found and fixed:

Dates	Days	Was	Corrected To	Reason
11/12–11/15/2024	Tue–Fri	NYS Workday	**NonNYS WFH (Sunnyvale, CA)**	After the 11/8 JFK→SFO vacation flight and 11/9–11/10 vacation weekend, person was working from Sunnyvale CA through the 11/16 SFO→JFK return flight. Location was not tracked in code as a WFH period.

Everything else checked out correctly:

- All WFH Seattle trips (4/22–4/29/23, 4/20–4/27/24, 6/1–6/8/24, 8/31–9/8/24, 11/24–11/30/24, 12/14–12/20/24, 1/6–1/7/25) — correctly NonNYS WFH ✓
- All work travel to non-NY destinations (SNA, TUS, TPA, SLC, SFO, ORD, DEL, AUS) — correctly NonNYS ✓
- All NYC work travel periods (5/31–6/14/25, 7/14–7/29/25, 10/4–10/18/25) — correctly NYS ✓
- All boundary days after returning to NYC from travel — correctly flipping to NYS ✓
- 1/20/25 (EWR→TPA departure day) — correctly MLK Day holiday, not non-NYS ✓
- Post-WA-move Seattle days — correctly NonNYS ✓

Updated Block1 summary: 440→**436** NYS, 57→**61** NonNYS, WFH 30→**34**. All check columns remain 0 ✅ .

	Workday tracker		Download
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why are some WFH not NYS workday while domiciled in NYS

Great question. Looking at the NYS tax rules file you provided:

From `NYS_tax_rules.txt` :

> **NYS workday includes:** Work in NYS regardless of domicile location
> **Non-NYS workday includes:** Work days outside NYS / Work days during work travel to other states (not NYS)
> "do not add Convenience of the Employer (COE) rule here. NYC tax form count these (WFH while work for NYS employer) separately and add to NYS workday to calculate COE"

So the rules as coded are **correct**:

- When you physically worked from **Seattle (WA)** while domiciled in NYC and employed by a NYC company, those days are **non-NYS workdays** for the IT-203F Schedule B count — because you were not physically in NY.
- The **COE (Convenience of Employer)** rule is what would *reclassify* those WFH-from-WA days as NYS workdays for tax purposes — but your instructions explicitly say **don't include COE in this column**. The NYC tax form handles that separately by adding COE days on top of the raw NYS workday count.

So the spreadsheet is intentionally tracking **physical presence in NY** in the NYS workday column, leaving COE days as non-NYS workdays. You would apply the COE rule separately when filling out the NYC tax form, which adds those WFH-for-NYC-employer days back in.

The WFH column flags those days so you can easily identify and count them for the COE calculation when needed.

<div style="border:1px solid #ccc; display:inline-block; padding:8px;">

vacation.txt

34 lines

</div>

<div style="border:1px solid #ccc; display:inline-block; padding:8px;">

work from home.txt

17 lines

</div>

update

I can see several important changes in the updated files:

1. **vacation.txt:** `11/24/24` and `12/14/24` flights moved from WFH to **vacation** list, with explicit "vacation until" dates
2. **vacation.txt:** `12/14/24 vacation until 1/7/25` — extends through 1/7/25 (previously WFH ended 12/20/24 and WFH 1/6-1/7/25)
3. **work_from_home.txt:** `11/24/24`, `12/14/24`, and `1/6/25` entries **removed**

Let me check the current state and apply all changes:

Ran 4 commands ›

▶ Check current state of affected date ranges

Script

▶ Plan the changes needed

Script

▶ Apply all changes to spreadsheet

Script

▶ Recalculate, verify no errors, check summary

Script

⊘ Done

All checks pass. Saving to output:

Ran a command, read a file ›

▶ Copy to outputs

Script

Updated. Here's what changed across the two files:

vacation.txt additions → reclassified 11 workdays from NonNYS WFH → Vacation:

Period	Dates changed	Was	Now
`11/24/24 "vacation until 11/30/24"`	11/25 Mon, 11/26 Tue, 11/27 Wed, 11/29 Fri	NonNYS WFH	Vacation
`12/14/24 "vacation until 1/7/25"`	12/16-12/20 Mon-Fri	NonNYS WFH	Vacation
same	1/6-1/7/25 Mon-Tue	NonNYS WFH	Vacation

work_from_home.txt removals: `11/24/24` , `12/14/24` , and `1/6/25` entries removed — WFH flags cleared on all 11 affected days.

Block1 summary impact: NonNYS 61→**50**, Vacations 24→**35**, WFH 34→**23**. All check columns remain 0 ✅ .

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why starting 12/21/24 Day Info is NYC?

Good catch. Looking at the data:

- `12/14/24 JFK→SEA` — flies to Seattle, **vacation until 1/7/25**
- `12/21/24 to 1/5/25 (Seattle)` — vacation range explicitly in Seattle

So from 12/14 onward the person is in **Seattle, WA**, not NYC. The location is wrong for 12/15 (Sun) through at least 1/5/25. Starting 12/21 the vacation range `(Seattle)` should have overridden the base NYC domicile location, but clearly didn't because the code still used NYC as the base location for that period (domicile hadn't changed to WA yet until 2/15/25).

Let me fix the location for all affected days:

Ran 4 commands, read a file >

☐ Check date range around the vacation period

Script

> Fix location text for 12/21/24-1/5/25 to Seattle WA

  Script

> Verify fix and recalculate

  Script

> Copy to outputs

  Script

📄 Presented file

✓ Done

Fixed. The root cause was that the `12/21-1/5/25 (Seattle)` vacation range set the vacation flag correctly but the location lookup fell through to the NYC domicile base location, since the WFH period code (which had been correctly placing you in Seattle through 12/20) didn't cover 12/21 onward.

14 days updated to **Seattle, WA:** 12/21-12/24, 12/26-12/31, and 1/2-1/5/25. Holidays (12/25 Christmas, 1/1 New Year's) already show the holiday name so no location is needed there. The full run from 12/15 through 1/7/25 now consistently shows Seattle, WA.

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RSUs.txt
12 lines

update

Block5 added with vest date 2/20/26. Need to add a new column to the daily log and a new row to the summary.

Ran 3 commands >

> Check current structure

  Script

> Add Block5 column to daily log and row to summary

  Script

Done

All checks pass (check column = 0). Copying to output:

Ran a command, read a file >

Copy to outputs

Script

Presented file

Done

Done. Block5 added:

- **Daily Log**: new Block5 column (O) with dark green cells and thick borders spanning 1/23/23 → 2/20/26 (1,125 days)
- **Summary**: new Block5 row — 468 NYS workdays, 251 non-NYS, 320 weekends, 34 holidays, 52 vacations, total 1,125 days, check = 0 ✅

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