Lecture 05

Types of Report

A report is generally divided into two major categories: Informal Report and Formal Report

4.1 Informal Report

A report which is short in length and used to deliver information within an organization is known as Informal Report. It deals with the analysis of everyday problems and issues along with some suggestions and recommendations. There are many types of informal report. Some of these are discussed below:

4.1.1 Sales Activity Report

This type of report exists as a template used by a salesperson to keep a record of all the sales activity of an organization. It also acts as a picture of all the progress made by an organization for the manager. An example is shown in Figure 1.

For Month _____ 2013

Salesperson _____
Territory _____   Date _____

	FORECAST	ACTUAL
Gross Sales	$100,000	$180,000
Gross Profit	25,000	50,000
% Gross Profit to Gross Sales	25.0%	27.8%
Net Profit	15,000	24,000
% Net Profit to Gross Sales	15.0%	13.3%
Salary	7,000	7,000
Commission	3,500	4,000
Expense: Auto	1,000	1,100
Travel	500	600
Entertainment	1,000	1,200
Other	100	500
Total Days Worked	22.00	21.00
Number of Calls Made	100	110
Average Calls Per Day	4.5	5.2
Number of New Accounts	10	12
Number of Accounts Lost	3	4
Number of Accounts at Period End	96	97
Number of Potential Accounts	43	1,500

Figure 1 Sales Activity Report

4.1.2 Progress Report

A progress report is generally used to present the status of an ongoing project and the attained progress. This category is used in different forms of scientific projects and is generally drafted for providing all the details to a funding agency supporting the project. An example of such a report is also shown in Figure 2.

Figure 2 Progress Report

4.1.3 Personnel Evaluation Report

The type of report which is used to assess and present the performance of an individual working in an organization is known as Personnel Evaluation Report. An example of a personnel evaluation report, shown in Figure 3, is an Annual Report, which shared with an employee to fill in his/her personal details and to be verified by his/her direct supervisor.

4.1.4 Financial Report

Type of report which is used to provide a detailed description of all the financial activities of some person, business, market or an organization in the form of a statement is known as Financial Report. Examples of such details may be found in Figure 4.

EMPLOYEE PERFORMANCE REVIEW

Employee Information

Employee Name: _____	Date: _____
Department: _____	Period of Review: _____
Reviewer: _____	Reviewers Title: _____

Performance Evaluation	Excellent	Good	Fair	Poor	Comments
Job Knowledge					
Productivity					
Work Quality					
Technical Skills					
Work Consistency					
Enthusiasm					
Cooperation					
Attitude					
Initiative					
Work Relations					
Creativity					
Punctuality					
Attendance					
Dependability					
Communication Skills					
Overall Rating					

Opportunities for Development

Figure 3 Personnel Evaluation Report.

4.1.5 Feasibility Report

Such types of report are used to provide a description of the assessment carried out to evaluate the recommended solutions and recommendations with respect to a problem or analyzed subject matter. The example shown in Figure 5 covers basics of a feasibility report, which include the necessary background for the assessment, scope of what the proposal covers and some financial details.

Event Specific Financial Report

As reported by The National Relief Network annually to The National Association of Secondary School Principals in Washington, DC for the National Committee on Student Contests and Activities

Program Name: National Relief Network's – Joining Hands to Defeat Disasters – A Student Volunteer Disaster Relief Program

No. of Participants	Min. 35
National Relief Network Program Fee	$499.00
TOTAL REVENUE	**$17,465.00**
Expenses per student:	
Meals	$40.00*
Beverages	$25.00*
Housing Allotment	$30.00*
Tool and Building Material Allotment	$25.00*
Transportation	$230.00
Team Shirts	$20.00
Program Manager	$25.00
Additional Program Staff and Administration	$70.00
Miscellaneous Expenses	$34.00
Total Expenses per student	$499.00
TOTAL EXPENSES PER PROGRAM	**$17,465.00**

NRN Community Service Division's program fee is based on traveling up to 800 miles from the point of departure for a six day/five night program. The program fee is increased $50 per student per day for each additional day. The program fee is increased by $25 per student for each 1 to 100 miles traveled over 800 miles from the point of departure to cover the additional cost of transportation.

*Based on an average over a one year period.

Figure 4 Financial Report

Sample Document / Feasibility Report

Feasibility of Maintaining In-house Training Versus Outsourcing

Introduction and Background

In the last year, Russell Medical Training (RMT) has grown from 52 to 126 employees. While this growth indicates the rapid expansion of RMT's market share, it also poses new challenges for us to face. An area of particular area to both management and human resources (HR) is the ability to continue to provide ongoing training for our employees. Currently, we have one trainer on staff, but the demand for training now exceeds what one trainer can provide. Additionally, RMT expects to increase the number of employees over the next six months, contingent upon pending contracts with new clients.

Bill Russell, CEO, asked HR to determine the feasibility of increasing the number of trainers on staff versus contracting with an outside firm to develop and provide training for us. The purpose of this report is to determine which of the two options is the best for RMT.

Scope

In preliminary research, we profiled eight firms specializing in corporate training. We eliminated all but three for lack of expertise in medical training and accepted bids from these remaining firms (See Appendix A for comparative data). Because Bill Russell requested that we limit our comparison to the feasibility of in-house versus outsourced training, we chose the most competitive firm of the three, Tech Knowledge Consulting, to compare with the cost of maintaining our own training staff.

Expanding Our Own Training Staff

This alternative requires hiring at least one additional trainer for the current number of employees and one trainer for every 50-60 additional employees. Based on conservative estimates, we should minimally consider hiring at least two additional trainers at the following costs:

2 additional trainers @ $45,000 annual salary	$90,000
Current training director's annual salary	$50,000
Benefits/Insurance costs (for 3 trainers)	$60,000
Additional training software (one time)	$150,000
Support for conferences/certifications (for 3 trainers)	$3,000
Total Cost for Three Trainers	**$293,000**

Figure 5 A feasibility report

4.1.6   Review Report

Review Reports are used to present a review on the studied literature or subject matter. Such reports are used with an intent to make a detailed content more specific for the readers of your draft so that they may not have to scan the details of a text. Generally, the audience for this is high-tech but may be modified to be read by the low-tech audience, if necessary.

4.1.7   Credit Report

Credit reports are usually prepared by a Credit Bureau to provide details of an individual's or an organization's credit history. Such reports help in maintaining a written record of all the transfers of money in the form of loans or mortgage.

Figure 6 A Credit Report

Figure 7 An Information Report

4.2   Formal Report

The second major type of a report which is long, detailed and complex is called a formal report. These are separately classified as these reports cover a written account of a major project and provide a review or results of a study based on the data collected and its interpretation. A formal report is generally divided
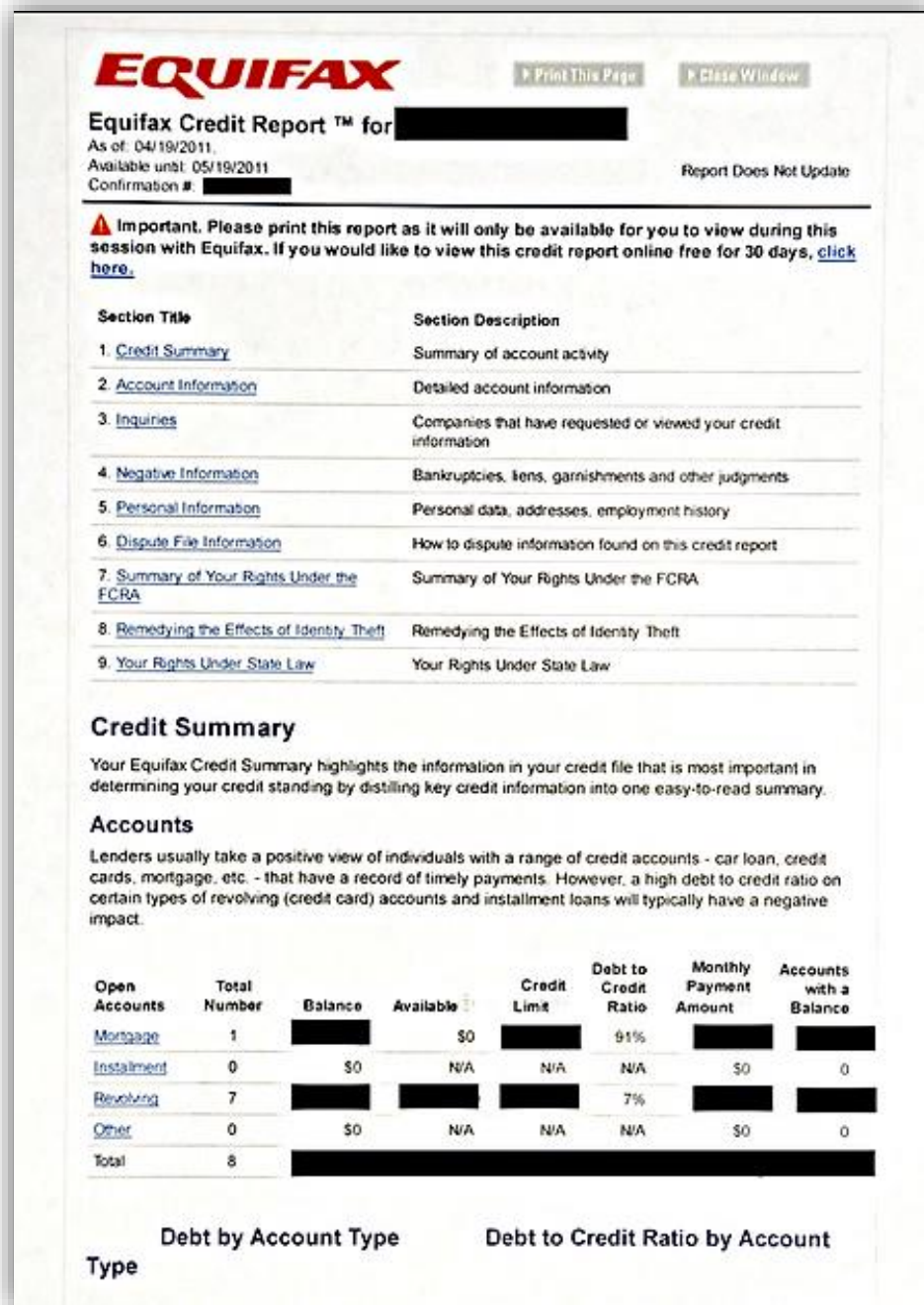
into three major categories: Informational Report, Analytical Report, Recommendation Report. These are discussed separately below.

Improving Morale

Introduction

Purpose

This report will show that implementing programs to improve employee motivation and moral will lead to better quality care and higher patient safety and satisfaction. Increased patient safety and satisfaction will have positive financial gains for the hospital through higher revenue from increased patient enrollment, and less money spent on litigation and malpractice insurance. This project will demonstrate that instituting programs to improve employee motivation and morale will save the hospital money, improve our image within the community, and ultimately lead to higher revenue.

Background

In the past year there has been a decline in patient satisfaction and quality of care at ABC Regional Hospital, this is reflected by declining scores on patient satisfaction surveys. Poor work quality and low productivity is the number one contributing factor. This decline in work quality led to several findings during this year's Joint Commission survey that had to be addressed before the hospital could receive full accreditation, as well as some patient safety concerns and adverse events. Recent employee surveys, interviews, feedback given at town hall meetings, and an increasing employee turnover rate indicate that low employee motivation and morale is the major contributing factor. "The management of health care personnel takes place in a complex environment involving a variety of professionals, extensive use of materials and equipment, and an array of services that extend beyond health care to include food, hospitality

4.2.1 Information Report

As the name implies, these reports focus on the provision of specific information. In such reports, specific information refers to the status or updates regarding an ongoing project. If some mechanism is being applied to carry out a survey or an experiment, an information report is used to provide details about the

extent to which this mechanism is getting successful in achieving the set goals and objectives. In other words, the focus of this report remains on the provision of results in general or the outcomes. An example could be a report on the payment of electricity bills by consumers. The example shown in Figure 7 provides details regarding the analysis of an interview of an existing employee.

Figure 8 A recommendation report

4.2.2 Analytical Report

The type of report which is used to provide a detailed analysis of the results and outcomes to draw a conclusion is known as Analytical Report. This type is used to focus on the interpretation of the incident, event or subject matter being investigated (analysis of what happened). An example could be of a report

analyzing the results of a report on traffic accidents, so that the outcome could be achieved in the form of suggestions.

4.2.3 Recommendation Report

These reports are used to advocate a particular course of action based on the study of suggestions and recommendations. Such a report should include discussion on results either supporting or negating a proposed suggestion. The example shown in Figure 8 analyzes why a certain medicine may be replaced with another and discusses required details to support the particular recommendation.

CASE REPORT

Supratentorial intraventricular solitary schwannoma. Case report and literature review

Roberto Jaimovich · Sebastián G. Jaimovich · Naomi Arakaki · Gustavo Sevlever

Abstract

Objective The objectives of this study were to present a case of a solitary intraventricular schwannoma with a review of the literature and to analyse the current theories of its origin. *Description* A 16-year-old male patient, without any pathological, genetic or familial history of significance, presented with symptoms of intracranial hypertension and progressive left brachiocrural paresis. The magnetic resonance image showed a bulky intraventricular space-occupying lesion emerging from the posterior horn of the right lateral ventricle, with an irregular nodular component intimately connected to the choroid plexus, and a multiloculated cystic component extending beyond the ventricle. *Surgical approach* A right parietal craniotomy was performed, revealing a multiloculated cyst with xantochromic fluid and a soft brownish red nodule. The lesion was dissected surrounding the periphery and coagulating a vascular pedicle related to the wall of the right lateral ventricle and its choroid plexus. Total excision was achieved. The pathological exam reported an intraventricular schwannoma (WHO grade 1). The patient evolved favourably, with no recurrence at 36-month follow-up. *Conclusion* The literature describes less than 45 cases of schwannomas not associated to cranial nerves of the following locations: intramedullary, leptomeningeal and only 12 intraventricular cases. The three theories explaining the origin of this last group describe: (1) a neoplastic transformation of peripheral nerve fibres, (2) a neoplastic transformation of autonomic neural tissue located within the intraventricular choroid plexus and (3) an abnormal embryogenesis leading to a failed migration of the neural crest cells. Complete resection is the therapeutic goal for this benign pathology to avoid recurrence.

Keywords Schwannoma · Intraventricular tumour · Choroid plexus

Introduction

Solitary schwannomas are generally benign tumours that emerge from the Schwann cells of the peripheral nervous system or the central nervous system at the vestibular division of the VIII cranial nerve (transition area of the central myelin towards the peripheral myelin) [2, 20]. They account for approximately 8 % of all the primary intracranial tumours and are more frequently found in middle-aged females, preferentially involving the superior vestibular branch of the acoustic nerve. They tend to be solitary except when they are associated to genetic syndromes (such as type 2 neurofibromatosis).

Schwannomas that are not associated to cranial nerves are extremely rare. The locations that have been reported are intramedullary, supratentorial intraparenchymal (fewer than 45 cases reported) [11], leptomeningeal [2, 5] and intraventricular. Therefore, the current theories explaining the origin of these rare locations can only be considered as hypotheses.

This report presents the case of a 16-year-old male with clinical signs of intracranial hypertension. The magnetic resonance image (MRI) showed a mixed solid-cystic lesion connected to the choroid plexus of the lateral ventricle that

R. Jaimovich (✉) · S. G. Jaimovich
Department of Pediatric Neurosurgery, FLENI Neurological Institute, Dr. Raúl Carrea Neurological Investigation Institute, 2325 Montañeses St,
Buenos Aires, Argentina
e-mail: robjai@hotmail.com

N. Arakaki · G. Sevlever
Department of Pathology, FLENI Neurological Institute, Dr. Raúl Carrea Neurological Investigation Institute, 2325 Montañeses St,
Buenos Aires, Argentina

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Figure 9 Review Report

4.3   Some Additional Forms of Report

4.3.1   Narrative Report

A narrative report is a report which has information in a logical sequence of events, usually in a chronology. Case Studies can be considered as an example of these reports.

4.3.2   Non-chronological Report

A report which provides a discussion of various aspects of a subject matter irrespective of the order in which the information is being provided.

4.3.3   Specialized Report

To accommodate the need for a report to provide a summary of all the other reports related to a single subject matter, specialized reports are made. This is different from a review report; a review report will discuss a particular subject matter whereas a specialized report may consider reports related to allied subject matter, as well. The example in Figure 9 is one such report intended for high-tech readers.

4.3.4   Accident Report

A report which provides all the documentation and investigation regarding an accident.