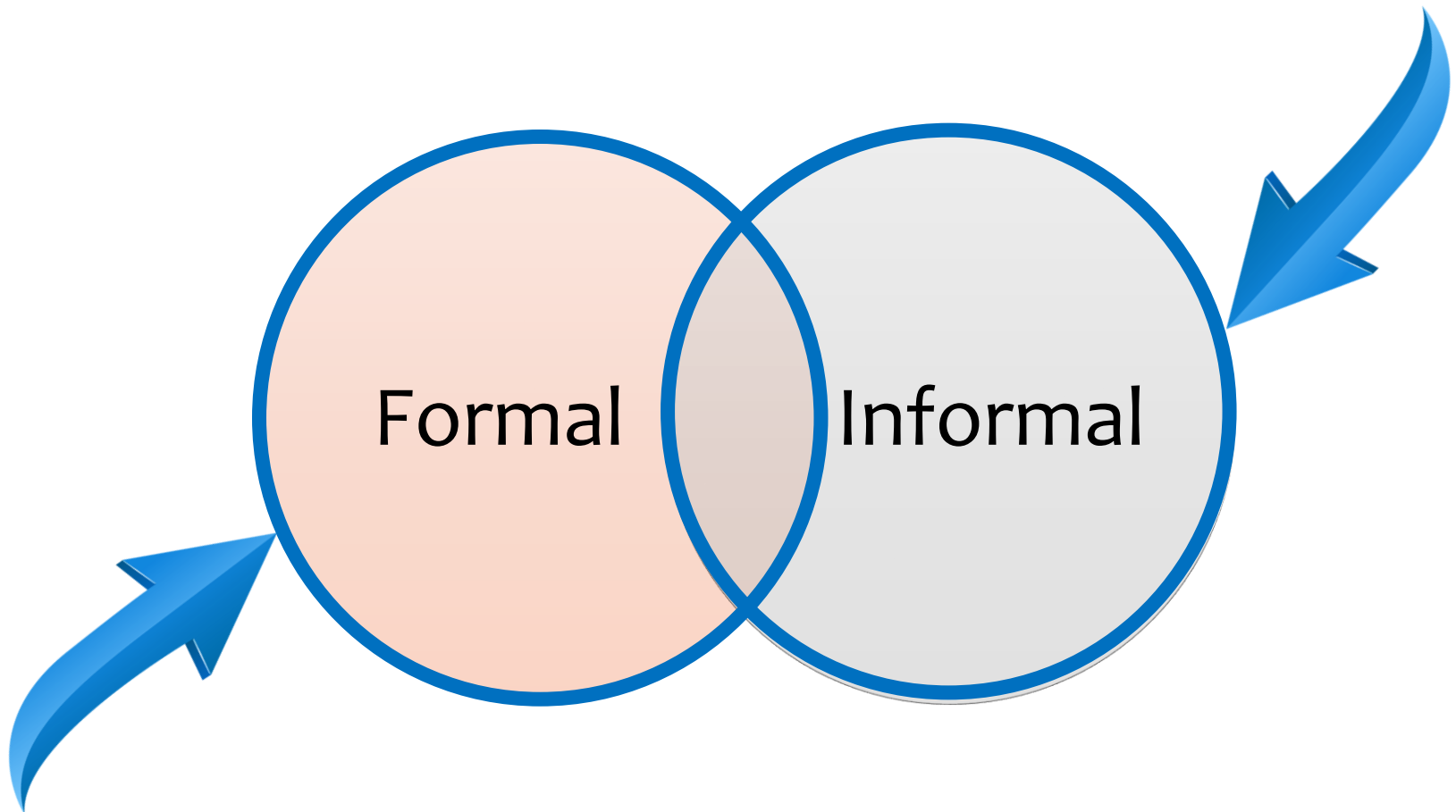


Previous Lecture

- Discussions
- Findings
- Conclusions
- Recommendations
- Appendices

Types of Report



Informal Report

- ✓ Information
- ✓ Analysis
- ✓ Recommendation
- ✓ Short-length and particular formality
- ✓ Deals with everyday problems and issues
- ✓ Usually written for readership within an organization

Types of Informal Report



Types of Informal Report

- ✓ **Sales Activity:** sales person
- ✓ **Progress Report:** science, reporting a funding agency
- ✓ **Personnel Evaluation Report:** performance assessment
- ✓ **Financial Report:** financial statement, financial activities
- ✓ **Feasibility Report:** evaluates solutions of a problem
- ✓ **Credit Report:** information regarding your way of handling debt

Sample Sales Activity Report

Sales Activity Report

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

Sample Personnel Evaluation Report

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						

Sample Financial Report



National Relief Network, P.O. Box 125, Greenville, Michigan, 48838

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
<u>TOTAL REVENUE</u>	\$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
<u>TOTAL EXPENSES PER PROGRAM</u>	\$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.

Sample Feasibility 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

Sample Literature Review

Childs Nerv Syst
DOI 10.1007/s00381-012-1977-4

CASE REPORT

Supratentorial intraventricular solitary schwannoma. Case report and literature review

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

Received: 1 August 2012 / Accepted: 16 November 2012
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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 brachioradial 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 xanthochromic 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

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Published online: 29 December 2012

Springer

Sample Credit Report

[Print This Page](#) [Close Window](#)

EQUIFAX

Equifax Credit Report™ for [REDACTED]

As of: 04/19/2011
 Available until: 05/19/2011
 Confirmation #: [REDACTED] Report Does Not Update

⚠ Important. Please print this report as it will only be available for you to view during this session with Equifax. If you would like to view this credit report online free for 30 days, [click here](#).

Section Title	Section Description
1. Credit Summary	Summary of account activity
2. Account Information	Detailed account information
3. Inquiries	Companies that have requested or viewed your credit information
4. Negative Information	Bankruptcies, liens, garnishments and other judgments
5. Personal Information	Personal data, addresses, employment history
6. Dispute File Information	How to dispute information found on this credit report
7. Summary of Your Rights Under the FCRA	Summary of Your Rights Under the FCRA
8. Remedying the Effects of Identity Theft	Remedying the Effects of Identity Theft
9. Your Rights Under State Law	Your Rights Under State Law

Credit Summary

Your Equifax Credit Summary highlights the information in your credit file that is most important in determining your credit standing by distilling key credit information into one easy-to-read summary.

Accounts

Lenders usually take a positive view of individuals with a range of credit accounts - car loan, credit cards, mortgage, etc. - that have a record of timely payments. However, a high debt to credit ratio on certain types of revolving (credit card) accounts and installment loans will typically have a negative impact.

Open Accounts	Total Number	Balance	Available	Credit Limit	Debt to Credit Ratio	Monthly Payment Amount	Accounts with a Balance
Mortgage	1	[REDACTED]	\$0	[REDACTED]	91%	[REDACTED]	[REDACTED]
Installment	0	\$0	N/A	N/A	N/A	\$0	0
Revolving	7	[REDACTED]	[REDACTED]	[REDACTED]	7%	[REDACTED]	[REDACTED]
Other	0	\$0	N/A	N/A	N/A	\$0	0
Total	8	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Debt by Account Type

Type

Debt to Credit Ratio by Account

Sample Progress Review

Progress Report: IDIDI Ten-Point Marketing Program/Strategy

The following is a brief year-end progress/status report summarizing the author's evaluation of the state of things as of late May 20XX. It is based on the Ten Point Marketing Program/Strategy that is defined in some detail on pages 14 to 17 of the IDIDI Management Report entitled "Product Profile and Marketing Strategy."

1. Corporate Sponsorship Program (CSP)

Progress To-date (20%)

This program has been actively pursued by SRF and DM since early February 20XX. More than 150 customized and/or one-to-one letters have been sent out to individuals at companies and organizations that have been identified as prime targets through extensive Internet and telephone research. Each letter involves both initial and follow-up telephone calls (often more than one) in order to identify the appropriate addressee and to determine to what extent the recipient organization is interested in the poster. To-date, the primary targeted individuals/companies have been government departments/agencies, addiction rehab/treatment centers, educational product distributors, and "hot leads" picked up from news reports, etc.

Current Status

Much work remains to be done on this program. Letters have to be drafted and sent to individuals/organizations already identified. More research needs to be conducted into additional targets such as insurance companies, law enforcement agencies, healthcare organizations, private foundations, government organizations/agencies, etc. *To continue to do this on an ongoing basis will require additional financial and human resources.*

2. Fund-Raising Partnership Program (FRP)

Progress To-date (0%)

This program has not yet been pursued in a serious fashion. To-date, the human and financial resources have not been available to do the necessary research on target organizations, to prepare the necessary correspondence, and then perform the required follow-up.

Current Status

Initial indications are that the re-selling of the poster by fund-raising organizations to raise money for their causes has potential and should be implemented, at least on a pilot basis. When the required financial and human resources become available, this program should be pursued.

3. Master Distributor Program (MDP)

Progress To-date (0%)

This program has not yet been fully implemented although, as of late May, there were plans to place ads in some newspapers to try to attract some master distributor candidates. (As a pilot for this program, an *Independent Distributor Program* was implemented on a test basis in February/March of 20XX. A number of "Business Opportunity" advertisements were run in Canadian newspapers, but the response to this campaign was less than anticipated. A handful of small-time local distributors were signed-up, but it was decided that this program was too complex and problematic to be used as a cost-effective revenue generator.) The lack of success with the Independent Distributor Program confirmed that the Master Distributor Program is the one that IDIDI should pursue.

Formal Report



Collection and data interpretation



Complex form of report



Written account of a major project

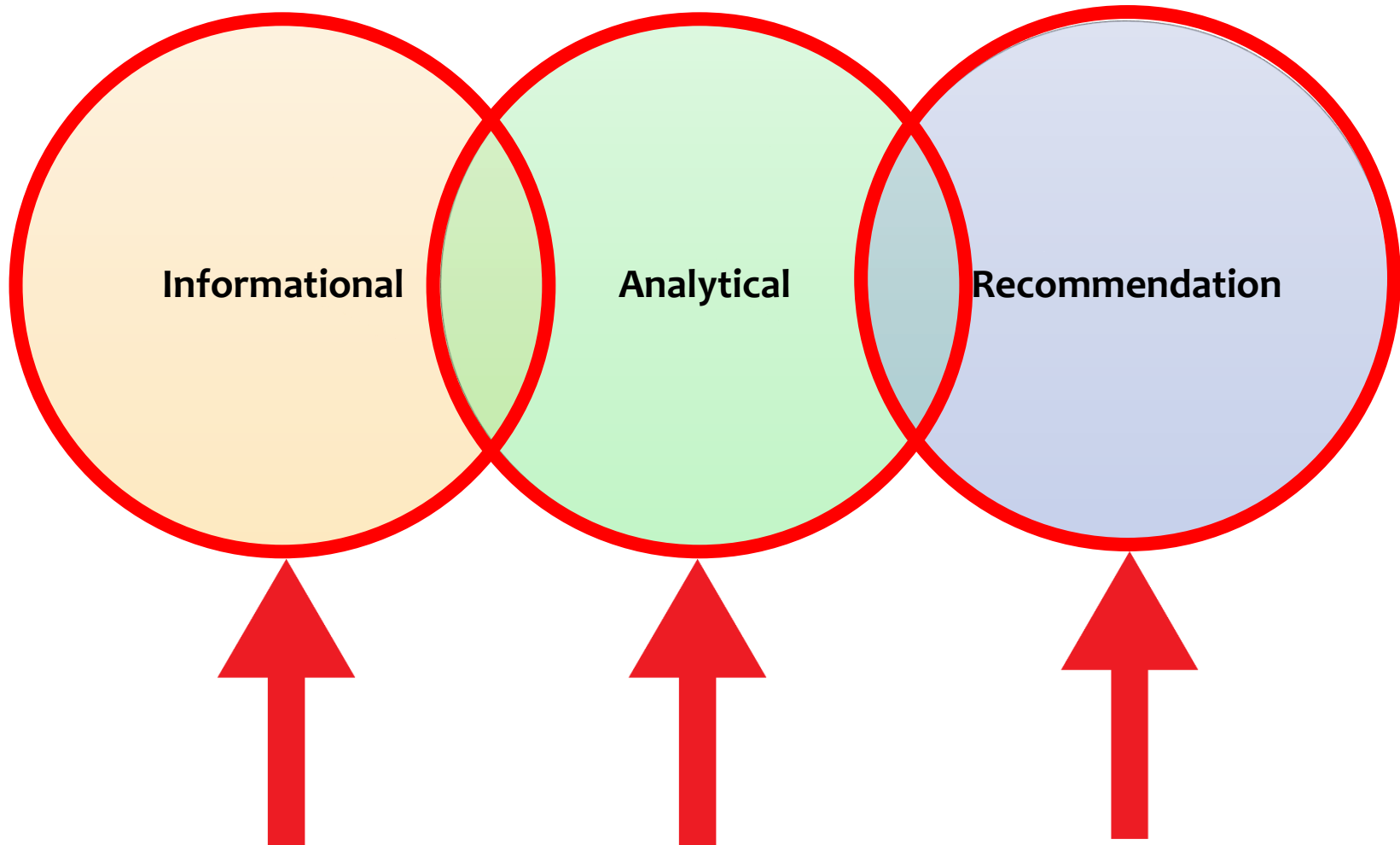


Long and detailed









Review, results of a study

Formal Report's Categorization



Informational Report

-  • Statuses
-  • Updates
-  • Mechanisms
-  • Results
-  • Focus remains on the **outcomes**
-  • Report on bills

Analytical Report

- ✓ Analysis of outcome to draw conclusion
- ✓ Focus is on the interpretation of **what happened**
- ✓ Results
- ✓ Report on traffic accidents
- ✓ Leading towards suggestions

Analytical Report Sample

Improving Morale

Introduction

Purpose

This report will show that implementing programs to improve employee motivation and morale 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

Recommendation Report

- ✓ **Advocates a particular course of action**
- ✓ Presentation of results supporting recommendation
- ✓ Similar to analytical report. **However...**
- ✓ Analyzing an action is not the same as recommending it

Recommendation Report Sample

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Anywhere Healthcare Center, PC.
1 Main Street
Boston, MA 02102
T:(617) 555-5555 F:(617) 555-4444

Nutritional Supplement Recommendation Report

Patients Name: John Doe
Date of Birth: 8/22/1977

John Doe is currently being evaluated and treated for a chief complaint of headaches. The desired outcome of medication is sometimes successful by sacrificing supporting pathways for the production of nutrients and enzymes relevant for other functions of the body. Studies suggest that certain nutritional supplements may help augment these unfortunate interactions. In an effort to provide the best care possible, the following nutritional supplement recommendations were made based on Mr. Doe's medications:

Medication	Nutrient	Potential Benefit
Hydrochlorothiazide (HCTZ)	CoQ10 (CoEnzyme-Q10)	CoQ10 synthesis may be impaired by Thiazide Diuretic use
Hydrochlorothiazide (HCTZ)	Magnesium	Magnesium deficiency may occur as a result of Thiazide Diuretic use
Hydrochlorothiazide (HCTZ)	Potassium	Replace Potassium loss which occurs with the use of Thiazide Diuretics
Hydrochlorothiazide (HCTZ)	Zinc	Replace Zinc loss that results from Thiazide Diuretic use
Lipitor	CoQ10 (CoEnzyme-Q10)	CoQ10 Synthesis impaired by statin medications
Lipitor	Fish Oil (Omega 3)	May improve lipid profile when combined with statin medications

These recommendations are based on the below referenced literature as well as clinical experience

Reviewed with the patient by: Dr. Palmer

Dr. Palmer

Additional Forms of Report

- ✓ **Narrative Report:** logical sequence (case studies)
- ✓ **Specialized Report:** summary of reports regarding a problem
- ✓ **Accident Report:** documentation, investigation
- ✓ **Non-chronological Report:** discussion of different aspects regarding a subject; non fiction book

Conclusions



- Types of report
- Informal report and its types
- Formal report and its types
- Additional forms of report