

Recording and Reporting

Learning objectives

at the end of lecture you should be understand:

- 1. definition of recording**
- 2. purposes of recording**
- 3. definition of reporting**
- 4. purposes of reporting**
- 5. definition of budgeting**
- 6. purposes of budgeting**
- 7. importance of budget**

Introduction

- Good health care administration depends upon good reports and records. Reports and records are good tool and vehicle for transmitting information from downward to upward to downward communication.
- All health care provider or health team member require the some information about client so that can plan and organized comprehensive care plan.

Record

- **Definition**
- **Is a clinical, scientific, administrative and legal document relating to the nursing care given to the individual family or community.**

The purposes of the Recording

- Records provide data for program planning and evaluation.
- Records are the tools of communication between the health workers, the family and other development personnel.
- Records indicate plans for future.
- Records provide baseline data to estimate the long-term changes related to the services.
- Records provide an opportunity for evaluating the services.
- Records help in the research for improvement of nursing care.

Types of Record

- **1) Forms, case cards and registers:**
- Family and village record
- Eligible couple and child register
- MCH Card\Register
- Child card\Register
- Birth and death register
- Sub-centers \PHC\clinic register
- Reports of blood stain of Malaria
- Malaria parasite positive case register and others.

2)Diaries.

3)Return.

Monthly report of Husband Wife (M and F)

- ❖ **Compilation report of HW (M and F)**
- ❖ **PHC monthly report.**

Records in the hospital

- The patient's clinical record**
- Records of nurses' observations, nurses' note**
- Records of orders carried out**
- Records of treatment**
- Records of admission and discharge**
- Records of equipment loss and replacement (inventory)**
- Records of personnel performance.**

Importance of records in Hospital

- **1) For the individual and family**
- Records serve to document the history of the client
- Records assist in the continuity of care
- Records serve as a n evidence to support or to refute the legal questions that arise
- Records serve to recognize the health needs and can be used as a research and teaching tool .

• **2) For the Doctors**

- Records serve as guide for diagnosis , treatment , follow-up , and evaluation of services.
- Records indicate progress and continuity of care
- Records help self –evaluation of medical practice .
- Records protect the doctor in case of legal issues.
- Records may be used for teaching and research.

3) For the Nurse

- The record provides with documentation of services rendered ,i.e. Show health condition of the client
- Records provide data essential for planning and evaluation of services for further improvement.
- Records serve as guide for professional growth .
- Records enable to judge the quality and quantity of work done .
- Records serve as communication tool between staff and other members involved in care .
- Records indicate plans in future

REPORTING

Definition:

Is an oral written of information shared between caregivers or workers in number of ways , and its usually written daily , weekly monthly or yearly.

Purpose of reporting

- To show the kind and amount of services rendered over a specified period
- To illustrate progress in reaching goals
- .As an aid in studying health conditions
- As an aid in planning
- .To interpret the services to the public and to other interested agencies.

Classification of reports

- **Oral report** : Oral reports are given when the information is for immediate use and not for permanency.
- **Written report** ; Reports are to be written when the information is to be used by several person , which is more or less of permanent value.

Budgeting

DEFINITION :

Is an operational plan ,for a definite period usually a year. Expressed in financial terms based on expected income and expenditure.

Purposes of Budgeting

- Budget supplies the mechanism for translating financial objectives into projected monthly spending pattern
- Budget enhancing financial planning and decision-making .
- Budget clearly recognizes controllable and uncontrollable cost areas
- Budget offers a useful format for communicating financial objectives.
- Budget allows feedback of utilization of budget
- Budget helps to identify problem areas and facilitates effective solution
- Budget provides means of measuring and recording financial success with the objectives of the organization.

IMPORTANCE OF BUDGET

- Budget is needed for planning for future courses of action and to have a control over all activities in the organization .
- Budget facilitates coordinating operation of various departments and section for realizing organizational objectives
- Budget serves as a guide for action in the organization.
- Budget help one to weigh the values and to make decision when necessary on whether one is of a greater value in the program than the other.

TYPES OF BUDGETS

- Operating Budgets (Revenues and Expenses): The operating budget provides an over view of agency's function by projecting the planned operation, usually for the upcoming year
- Capital Expenditure Budgets: this types are related to long range planning and include physical changes such as replacement or expansion of the plant, major equipment, and inventories
- Cash Budgets : cash budgets are planned to make adequate funds available as needed and to use any extra funds profitably.
- Labor or Personal Budget : Personnel budgets estimate the cost of direct labor necessary to meet the agency's the objectives
- Flexible Budgets :Some costs are fixed and do not change with the volume of business.

- Strategic planning budgets: Long-range budget for long-range planning are often called the agency's strategic plan and are usually projected for 3 to 5 years.

ADVANTAGES OF BUDGETING

- The study and analysis necessary to prepare one.
- State goals for all units.
- Encourage managers to make a careful analysis of operations.
- Hasty judgments are minimized.
- Staffing, equipment, and supply needs be projected and waste minimized.
- Financial matters can be handled in an orderly fashion.
- Agency activities can be coordinated and balanced.

DISADVANTAGES OF BUDGETING

- Convert all aspects of organizational performance.
- Organizational development and research efforts, may be ignored.
- Budgetary goals may supersede agency goals and gain autocratic control of the organization.
- Skill and experience required for successful budgetary control.
- Budget planning is time-consuming and expensive.