



Annual Review of an Education Health Care Plan

This information sheet will explain the annual review process, some of your rights and where you can get more information and help.

The information on this sheet is taken from the SEN Code of Practice 2015:

<https://www.gov.uk/government/publications/send-code-of-practice-0-to-25>

Part 1:

What Is an Annual Review?

The local authority must review your daughter/son's Education Health Care (EHC) Plan to:

- Review their progress.
- Make sure that the EHC Plan is up to date.
- Help them to meet their outcomes.

How Often Should an Annual Review Happen?

- The EHC Plan **must** be reviewed, a **minimum of every 12 months** (from the date of when the 1st final EHC Plan was issued or within 12 months from the date of the last annual review)
- Children under 5 should have 3-6-month reviews but a minimum of 12 months (from the date of when the 1st final EHC Plan being issued or within 12 months from the date of the last annual review)
- Sometimes, there are situations when an annual review may be carried out earlier, for example, if there are significant changes in your daughter/ son's needs, a new diagnosis. This is sometimes called an '**Emergency Annual Review**'
You, the education setting (school, college) or the LA can call an emergency Annual Review. However, only the LA can decide if an emergency annual review should happen or not.

Who is Responsible for an Annual Review?

It is the Local Authority's (LA) **duty** to make sure the annual review process is completed.

Your role

It is important that your daughter/son and you are actively involved in and be at centre of the annual review process.



What are the Steps for an Annual Review of an EHC plan?

The annual review process is broken down into legal steps that **must** be followed:

Please Note: Although the LA is responsible for the annual review process – it will pass on the responsibility of some steps to the to the Headteacher/principal of the education setting

Step 1 – Informing the Education Setting

The LA informs the headteacher/principal which children and young peoples' Annual Reviews need to be held in the coming term.

Step 2 - Obtaining Information and Advice

The headteacher (usually the Special Needs Co-ordinator (SENCO) will do this), **must** obtain written information and advice(reports) about your daughter/son from the following people:

- You and your daughter/son.
- The head teacher of the education setting (usually the Special Needs Co-ordinator (SENCO) will be asked).
- A member of the LA.
- Social care professional.
- Health Care professional. For example, a Speech and Language Therapist, Child and Adolescent Mental Health Service (CAMHS).

Other Professionals who are involved in supporting your daughter/son, for example, teaching assistant or specialist teacher (Literacy Support Service) and or Educational Psychologist (EP).

The information and advice should provide details about your daughter/son's progress and being part of the teaching and learning. Also, whether the support your daughter/son is getting is meeting their needs (Section B) and helping them to make progress towards their outcomes (written in Section E of their EHC plan).



Step 3 - Organising the Annual Review Meeting

Your daughter/son's education setting will organise and hold the annual **review meeting**.

Please Note: If they are not in an education setting the LA will often carry out all the annual review steps, including the meeting.

Your daughters/son's education setting **must** invite the same people they asked for Information and Advice from (**See Step 2**):

The education setting will be at the meeting (usually the Senco) -who will also chair(lead) the meeting.

Please Note: Everyone invited to the annual review meeting, **must** be given at least, **2 weeks' notice** before the annual review meeting date to attend.

You and all the professionals invited to the meeting **must** also receive the written information and advice gathered **at least two weeks** before the meeting date. This gives you and the professionals time to read through all the information and advice and prepare for the annual review meeting.

If you do not receive this information **2 weeks before the meeting** -you can ask for the annual review meeting to be changed to a later date.

Step 4 - The Annual Review Meeting:

The aim of the annual review meeting is to gather everyone's opinion(view) about how your daughter/son are being supported. You and your daughter/son's views and wishes are essential and should be at the centre of this process.

The following points should be discussed, for example,

- Focus on progress made towards achieving outcomes written in the EHC Plan
- Look at the information and advice gathered to see how your daughter/son's school can use it to support their progress and access (taking part) to teaching and learning



- Review the special educational provision (Section F of the EHC Plan) to ensure it is helping your daughter/son access teaching, learning and supporting their progress.
- Review any health and social care provision and checking its impact towards achieving the outcomes
- Discuss whether the EHC plan is still suitable considering the progress your daughter/son has made during the previous year, or things have changed for them or if changes are required?
- Set new short-term targets for the next year and agree new outcomes (where needed).
- Sometimes as part of the annual review, you or your daughter/son, the educational setting might want to request changes to the EHC Plan if their needs have significantly (a lot) changed.

The headteacher or SENCO should take notes at the meeting including yours and your daughter/son's views. Do make sure these are recorded. If not, then you can email/write and send to your daughter/son's case manager after the annual review meeting.

Step 5 – After the Annual Review Meeting:

Within 2 weeks of the meeting:

- the headteacher (although usually the SENCO) of your daughters/son's educational setting **must** write up and send out an annual review report (using the Wandsworth Annual Review report template) to everybody invited to the review meeting. You and the LA (usually your case manager) **must get** a copy of the report.

The review report (information and advice) will also include any reports gathered as part of the annual review.

- The annual review report will give clear recommendations on any changes to the EHC Plan (if needed) and will give information on any differences in views. The LA will look at the information in this report and review the EHC Plan and make decision/s.

Within 4 weeks of the meeting:

The LA **must** send you a letter (a notification) to inform you, your daughter/son (if they are 16 or over) and their education setting of the outcome(decision) of the annual review



The decision the LA will make will be one of the following:

- Keeping the EHC Plan as it is (no changes).
- *Amending the EHC Plan (e.g. changing what's written in the EHC plan for example, such as section B (their needs) and or F (the help/support they need)
- Ceasing (ending) the EHCP. This may be if the LA, you or your daughter/son feel that they no longer need the support of an EHC Plan

If the LA decides not to amend the EHC Plan or decides to cease it then they **must** notify you in the above letter of your right to appeal (Please see our Right of Appeal Information Sheet)

***Amending the EHC Plan** (e.g. changing information for example, such as section B or F):

The LA will send you an original copy of the EHC Plan with the suggested amendments. You will be given **15 calendar days** to give your views on these.

If the LA decide to make changes to the EHC plan they **must** issue you an amended EHC plan as quickly as possible and within **8 weeks** of the amendment notification letter (see above) following the annual review meeting.

Part 2:

Preparing for an Annual Review Meeting

As mentioned earlier, information and advice(reports) **must** be given to you at least **2 weeks** before the annual review meeting date.

This will give you time to read through the reports so that you can ask any questions in the annual review meeting.

You can also send in yours and your daughter/ son's views before the meeting. The education setting may be able to help you and your daughter/son to write your views for the annual review or you can use our template. Please click this link WIAS&S website:

<https://www.wandsworth.gov.uk/schools-and-admissions/wandsworth-information-advice-and-support-service-wiass/wiass-information-and-resources-on-send/> Then scroll down to Templates.



You may want to write down:

- Any changes to Section A, e.g. long-term aspirations or events in 'My Story'.
- Progress in areas such as 4 areas of SEN (cognition and learning, communication and interaction, physical skills including sensory and Social Emotional Wellbeing and Mental Health).
- Progress in outcomes in Section E of the EHC Plan.
- If there is any information that needs to be included in Section B(SEN), C (Health Needs) and or D (Social Care Needs) of the EHC Plan.
- What provision (see section F, G and H of EHC Plan) you think is helping your daughter/son and if they need more or different type of support.
- Is the educating setting (school, college) still suitable in meeting their needs?
- Any areas that you are concerned about and or is going well.

If your daughter/son is in Year 9 or older:

Children in Year 9 (and following years), annual reviews, follow the above steps and **must** also include a focus Preparing for Adulthood (PFA), including employment, independent living and taking part in the community and society.

Where can I get more information, advice or support on the annual review process?

If you have questions about your daughter/son's annual review you can

- Speak to the SENCO /Inclusion Manager at their education setting
- Contact their case manager in SNAS.
- You can read the SEND Code of Practice 2015(see the link at the beginning of this sheet and look at information in Chapter 9, page 194)
- You can follow the link to the Independent Provider of Special Educational Needs Advice (IPSEA) link on Annual Reviews: <https://www.ipsea.org.uk/the-annual-review-process>
- You can get contact us.

How to contact us:

Call back service: 020 8871 8065(24-hour answer machine)

Email: wias@wandsworth.gov.uk

Web: www.wandsworth.gov.uk/wias