



## ANNUAL REVIEW OF AN EDUCATION, HEALTH AND CARE (EHC) PLAN

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

# ANNUAL REVIEW OF AN EDUCATION, HEALTH AND CARE PLAN

The information on this sheet is taken from the [SEND Code of Practice 2015](#):

It would be helpful to read the following WIASS Information Sheets alongside this one for further information at: [wiass.org.uk](http://wiass.org.uk)

- Education, Health and Care (EHC) Plans
- Right of Appeal to SENDIST

## PART ONE

### ■ What is an Annual Review?

The Local Authority (LA) **must** review your child's or young person'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 first final EHC Plan was issued or **within 12 months** from the end of the last annual review)
- Children under 5 should have their review within **three to six months** but a minimum of 12 months
- Sometimes, there are situations when an annual review may happen earlier, for example, if there are significant changes in your child's or young person's needs, or a new diagnosis. This is sometimes called an **Emergency or Early Annual Review**, the education setting (school or college) can ask for 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 LA's duty to make sure the annual review process is completed.

### ■ Your role

It is important that your child or young person and you are actively involved with and at the **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 of the steps to the headteacher/principal of the education setting.

#### Step 1 – Informing the Education Setting

The LA informs the headteacher 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 or named person at their college will do this), **must** obtain written information and advice (reports) about your child from the following people:

- You and your child.
- The education setting.
- 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

# ANNUAL REVIEW OF AN EDUCATION, HEALTH AND CARE PLAN

your child or young person, for example, teaching assistant or specialist teacher (Literacy Support Service) and/or Educational Psychologist (EP).

The information and advice **should** provide details about your child's or young person's progress and being part of the teaching and learning in school or college. Also, whether the support your child or young person is getting is meeting their needs (Section B of the EHC plan) 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 child's or young person's education setting will organise, hold and chair 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 setting up the meeting.

Your child's or young person's education setting **must** invite the same people they asked for Information and Advice from in "**See Step 2**".

The education setting will usually chair the meeting (usually the SENCO)

**Please Note:** Everyone invited to the annual review meeting, **must** be given at least, **two 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, advice and prepare for the annual review meeting.

If you do not receive this information **two 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 child or young person is being supported. Your child's or young person's and your views, 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 child's or young person's education setting 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 child or young person to 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 child or young person has made during the previous year, or if things have changed for them or 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 child or young person and or, the education setting might want to request changes to the EHC Plan, if there has been a significant change in needs and the support required.

The headteacher or SENCO **should** take notes at the meeting including your child's or young person's and your views. **Do make sure these are recorded. If not, then you can email/write to your child's or young person's EHC Co-ordinator in the SEN team in Wandsworth, following the annual review meeting.**

## Step 5 – After the Annual Review Meeting:

**Within two weeks of the meeting:**

- the headteacher (usually the SENCO or named person at their college) of your child's or young person's education setting will write up and send out an annual review report (using the Wandsworth Annual Review report template) to everybody invited to the review meeting, including you and the LA (usually EHC Co-ordinator) who

# ANNUAL REVIEW OF AN EDUCATION, HEALTH AND CARE PLAN

**must** receive a copy of this.

The annual review report will also include any reports gathered as part of the annual review process.

- The annual review report **should** provide clear recommendations on any changes to the EHC Plan (if needed) and will give information on any differences in views. The LA will review and make a decision about the current EHC plan based on what is written in this report.

## **Within four weeks of the meeting:**

The LA **must** send you a letter (a notification) to inform you, your young person (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 or proposing to name a new education setting in Section I.)
- \*\*Ceasing (ending) the EHCP. This could be because the LA, your child, or you feel that they no longer need the support given through an EHC Plan

\*If the LA decides not to amend the EHC Plan or proposes to cease it then they **must** notify you and your young person (aged 16 -25) in the above letter of your **right to appeal**. Please see our **Right of Appeal to SENDIST Information Sheet**.

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

If the LA decides to make amendments to the EHC Plan, they **must** also inform you of what the proposed amendments will be.

This means the LA **must** also include a copy of the proposed (draft) amended EHC plan with the outcome of the annual review letter you receive. You will be given **fifteen calendar days** to give your views on the proposed amendments.

When you receive the decision letter, this means the annual review process has ended. Although any amendments the LA are going to make to the EHC plan will still need to be made.

The final EHC plan **must** be issued as soon as practicable and within a further **eight weeks** maximum. Therefore, the LA **must** send you the final amended EHC plan within a maximum of **twelve weeks** of the annual review meeting.

**To see an example of the annual review report form and how Wandsworth expects the annual review process is carried out for children in Wandsworth and Out of borough schools, please follow the link below and scroll down to Section 6, of the Wandsworth (SEND Handbook):** [send\\_handbook.pdf \(openobjects.com\)](#)

## PART TWO

### ■ Preparing for an Annual Review Meeting

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

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

You can also send in your child's or young person's and your views before the meeting. The education setting may be able to help your child or young person and you to write your views for the annual review or you can use our templates.

**Please click this [link](#) then click on Annual Review of an EHC plan page.**

### **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 the **four areas of SEN** (cognition and learning, communication and interaction, physical skills including sensory and social emotional wellbeing and mental health).
- Progress towards 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 Sections F, G and H of EHC Plan) you think is helping your child or young person and if they need more or different types of help.

# ANNUAL REVIEW OF AN EDUCATION, HEALTH AND CARE PLAN

- Is the education setting (school or college) is still suitable in meeting their needs?
- Request for a Personal Budget
- Any areas that you and your child or young person are concerned about and/or are going well.

## ■ If your child is in Year 9 or older:

Annual reviews for children or young people in Year 9 onwards, follow the above steps and **must** also include a focus on Preparing for Adulthood (PFA), for example, employment, independent living, taking part in the community and health.

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

If you have questions about your child's or young person's annual review, you can

- Speak to the SENCO at their school or named person at their college
- Contact their EHC Co-ordinator in the Special Needs, Assessment Section (SNAS).
- You can read **Chapter 9, page 194 onwards, in the SEND Code of Practice 2015** (see link at the beginning of this information sheet)
- You can read **Section 6** of the Wandsworth SEND Handbook; [send\\_handbook.pdf \(openobjects.com\)](#)
- You can follow the link to the Independent Provider of Special Educational Needs Advice (IPSEA) link on [Annual Reviews](#):
- You can get contact us.



### ■ How to contact us:

Helpline number: **020 8871 8065** (24 hour answer machine)

Email: [wias@wandsworth.gov.uk](mailto:wias@wandsworth.gov.uk)

Web: [wias.org.uk](http://wias.org.uk)