

## Annual Review

### What is an Annual Review?

Reviewing an Education Health and Care Plan must focus on the child's or young person's progress towards achieving the outcomes specified, and whether the outcomes are still appropriate.

Reviews should also:

- Gather the parents and child / young person's views
- Gather and assess information from professionals involved
- Review the provision set out in the plan to ensure it is still effective
- Review the health and social care provision
- Consider the progress made by the child and young person and if the plan and educational setting remains appropriate
- Review any previous targets set out
- Set new targets for the coming year and new outcomes if needed

### When should an annual review take place?

All Education Health & Care Plans must be reviewed at least once a year. This annual review process must be completed by the anniversary of the final EHCP or the last annual review. Parents/carers can ask the school or local authority to arrange an annual review before then if they have significant concerns.

Local Authorities should consider reviewing an EHC Plan for young children under five at least every 3 to 6 months.

If the child is due to transfer between key phases of education, an EHC Plan must be reviewed and amended in sufficient time prior to the transfer. The following key transfers must be completed by **Feb 15<sup>th</sup>** in the calendar year of the transfer:

- early Years provider to school
- infants to juniors
- primary to middle
- primary to secondary
- middle to secondary

For young people moving from secondary to Post 16 institutions, the process must be completed by **March 31<sup>st</sup>** in the calendar year of the transfer.

The Local Authority (LA) tells each school which Education Health & Care Plans should be reviewed each term. The Head Teacher is responsible for making the arrangements for the meeting, however, they may delegate this role to the SENCo. The meeting will usually be held at the child/ young person's educational setting.

## **Year 9 review**

The Year 9 annual review of an EHC plan should start planning for transition into adulthood. Each review thereafter must have the focus on preparing for adulthood. This review will start to gather information regarding the young person's and their family's aspirations for their future, including who needs to be involved, target planning and the support needed. The review will explore provision accessible to students in order for them to be healthy, participate in society, live independently, access further education and/or employment where appropriate.

To gather the young person's views and aspirations, an additional form will need to be completed. This is called a 'Preparing for Adulthood Plan' It is helpful if school support the young person to fill this in.

## **Preparing for the meeting**

As part of the annual review, a meeting must take place. Schools must seek advice from all relevant professionals prior to the EHC Plan review meeting. They must circulate this information and send invitations at least 2 weeks before the date of the proposed meeting.

The school should invite:

- Child/Young Person
- Parents, carers or foster carers
- School representative (usually this should be the SENCo)
- A representative from the Local Authority SEND Team
- A social care representative if appropriate
- A health care representative
- Any other relevant professional involved with the child or young person

If a relevant professional is unable to attend the meeting, their advice should still be obtained.

Where appropriate and depending on age, the child or young person should be invited to all or some of the meeting. If you want to discuss something when they are not there, ask for some time for this.

## **Top Tips**

- Read through the EHC Plan. Is the information still relevant? Do you understand everything in it?
- Do you feel that targets have been met?
- Read through any up to date advice from professionals. Have there been any significant changes or recommendations?

- You might want to make a copy of the EHC Plan to highlight parts or make notes about the parts you would like to discuss.
- You could make a list of questions or comments you would like to address at the meeting. Tick them off as you discuss them.
- You can ask a family member or friend to come with you to support you and make notes.
- Is there anything that is missing from the plan? (For example: A social worker is involved with the child or young person however this information isn't in the plan.)

If there are difficult issues to discuss, you can get in contact with the Information Advice and Support Service. We can discuss your concerns and help you prepare for the meeting.

### **Your Contribution**

At least 2 weeks before, the school should send you a copy of the paperwork which will include the opportunity to update your views on the 'About Me' (for the child/ young person) and 'All About My Family.' If you do not receive this paperwork, remind the school, but you can also write your thoughts on paper or download the forms, and guidance, from the Local Offer:

<https://www.shropshire.gov.uk/the-send-local-offer/education/education-health-and-care-plan/ehcp-annual-reviews/>

Most parents complete the form and return it to the school before the meeting, so that it can be discussed. You can also choose to return the form to the school as part of the meeting or send it directly to the Local Authority.

Contact the Information, Advice & Support Service if you need help with this.

### **At the Annual Review Meeting**

Do not be afraid to ask teachers and others to explain jargon or terms you do not understand.

The following issues will be considered during the Annual Review meeting:

- the parents/carers views
- the child's/young person's view
- the school's view (including progress made in learning)
- the long-term objectives and targets
- reports from other professionals
- any change in circumstances that could affect progress

- current provision (teaching arrangements etc.)
- educational targets
- any actions to be taken, and by whom

Finally these questions will be considered:

- does the child still need an EHCP?
- does the EHCP need to be amended (changed)?

### **Following the Annual Review Meeting**

The Head Teacher is responsible for ensuring that a report is prepared about what was discussed and agreed, including any proposed amendments. This report must be sent to everyone involved within 2 weeks of the meeting, including parents/ carers and the young person.

The Local Authority must then decide and inform you within 4 weeks, whether to:

- continue with the EHCP as it is
- amend (change) the EHCP to reflect changes to the child's/young person's needs
- cease to maintain (end) the EHCP

The Local Authority must write to you with their decision and inform you of your rights if you disagree. Once you have received this letter, the annual review process will be considered complete. If it is agreed that the plan will be amended, the LA need to start the process of amending without delay. Once they have sent you the proposed amendments, the process must be complete in 8 weeks.

If you disagree with any decisions that are made following the annual review, please see our factsheet on 'Appealing a decision about an EHCP.' You can also contact the Information, Advice & Support Service to discuss your options.

### **Where can I get further information, advice or support?**

Contact the IASS team on:

**Phone:** 01743 280019 (Open 10am-4pm Monday—Friday)

**Web:** [www.cabshropshire.org.uk](http://www.cabshropshire.org.uk)

[www.facebook.com/IASSShropshire](https://www.facebook.com/IASSShropshire)

**Email:** [iass@cabshropshire.org.uk](mailto:iass@cabshropshire.org.uk)

**Address:** Fletcher House, 15 College Hill, Shrewsbury, SY1 1LY