
One-minute guide for the Annual Review of Education Health and Care Plans

The Purpose of the Annual Review

Every child or young person with an Education, Health and Care Plan (EHCP) (up to the age of 25 years) should have their plan reviewed annually (every six months for children under the age of 5). The purpose of the annual review is to monitor progress towards the outcomes and longer term aspirations within the EHCP. As part of the review process information should be gathered and assessed from all services, education, health and social care, with provision included in the plan. The review should also review any interim targets set by the current educational setting.

The review will consider the continuing appropriateness of the EHCP and whether any changes need to be made to outcomes, enhancing the provision, changing the educational establishment, or whether the EHCP should be discontinued. New interim targets for the next year should also be set as part of the review.

Planning for the Annual Review

Under the Special Educational Needs and Disabilities (SEND) Code of Practice it is the duty of the Local Authority to review all EHCPs. This should take place approximately 12 months after the date that the EHCP was issued. All annual reviews should be person-centred and involve the views of the child or young person, or their parents. Where a

young person is over the age of eighteen and are able to act independently on their own behalf an annual review can take place without their parents. It is the duty of professionals across the local area to co-operate with the Local Authority to ensure the review takes place.

The Local Authority will usually delegate the task of convening and holding the annual review to the child, or young person's educational setting, especially where the attendance is at a school within the Local Authority. As part of the preparation for the review, the educational setting, services working with the child or young person, parents and the child or young person will be asked to contribute advice and information for the review. The setting will invite parents/young person, a Local Authority Special Educational Needs (SEN) Officer, and anyone else working with the child or young person.

Meeting and Follow up

The setting must prepare and send a report of the meeting to everyone invited within two weeks of the meeting. The report must set out recommendations on any amendments required to the EHCP and should refer to any difference between the setting's recommendations and those of others attending the meeting.

Once the meeting has been held the setting will have two weeks in which to send the outcomes of the review to the parents/young person and to the Local Authority. At this point the Local Authority will have a further two weeks (so that the decision is made within four weeks of the review) to decide whether it proposes to keep the EHCP as it is, amend the plan or cease to maintain the plan.

Annual Reviews and Key Transition Points

The annual review process is significant for key transitions points for children and young people with an EHCP. There is clear direction in the SEND Code of Practice in relation to the key educational transition points outlined below.

Transitions between school phases:

The review and any amendments **must** be completed by 15 February in the calendar year of the transfer at the latest for transfers into or between schools. The key transfers are:

- **early years provider to school**
- **infant school to junior school**
- **primary school to middle school**
- **primary school to secondary school, and**
- **middle school to secondary school**

Year 9 Annual Reviews and Preparation for Adulthood

All reviews taking place from Year 9 at the latest and onwards **must** include a focus on preparing for adulthood, including employment, independent living and participation in society. This transition planning **must** be built into the EHCP and

where relevant should include effective planning for young people moving from children's to adult care and health services, including information about annual health checks for any young person with a learning disability. It is particularly important in these reviews to seek and to record the views, wishes and feelings of the child or young person.

Annual Reviews and Post-16 education

For young people moving from secondary school to a post-16 institution or apprenticeship, the review and any amendments to the EHCP – including specifying the post-16 provision and naming the institution – **must** be completed by 31 March in the calendar year of the transfer. However, transfers between post-16 institutions may take place at different times of the year and the review process should take account of this.

Annual Reviews for those whose plans are ceasing

As the young person is nearing the end of their time in formal education and the plan is likely to be ceased within the next 12 months, the annual review should consider good exit planning. Support, provision and outcomes should be agreed that will ensure the young person is supported to make a smooth transition to whatever they will be doing next – for example, moving on to higher education, employment, independent living or adult care.