**EHCP Annual Reviews**

**Guidance and Toolkit for Education Settings and Professionals who Contribute to Annual Reviews**

**DRAFT version 3.0**

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**EHC Annual Review Guidance for Settings and Professionals**

1. **Introduction**

This Annual Review guidance and toolkit is aimed to support schools and other educational settings fulfil their role in the statutory Annual Review process and ensure that it provides a high-quality experience for families. It also contains helpful information for those contributing to Annual Reviews. It should be read in conjunction with the SEN Code of Practice, notably Chapter 9 (page 194).

1. **Why are Annual Reviews important?**

Annual Review meetings are crucial in ensuring the child and family are placed at the centre of the review of progress towards achieving their outcomes and longer-term aspirations, allowing them to see the impact of the special educational, health and social care provision in place through the EHCP and to consider ongoing needs.

The Annual Review meeting and its follow-on report is the primary means by which the local authority makes important decisions regarding the EHCP:

* Whether to maintain the EHCP without any amendments
* Whether to maintain and amend the EHCP
* Whether to cease the EHCP

All such decisions are appealable to the SEND First Tier Tribunal.

1. **Purpose of the Annual Review**

The SEN Code of Practice sets out the requirements for the review of Education Health and Care plans (EHCPs). The purpose of the annual review is to:

* + Review the child or young person’s progress toward meeting the outcomes in the EHC Plan and the targets set at the previous review. Progress should be reviewed across all relevant education, health and social care categories.
  + Plan the following year’s targets and support strategies.
  + Evaluate the effectiveness and relevance of the provision set out in the EHC Plan, and consider if it is necessary to request amendment, re-assessment or cessation of the EHC Plan.
  + Promote the preparing for adulthood (PfA) aspects of planning, particularly from Y9 onwards.
  + Identify and celebrate progress.
  + Check that basic information on the child and family is up to date and complete.
  + Give families and young person the opportunity to request a Personal Budget and review the effectiveness of any Personal Budgets already in place.

**4. Responsibilities**

4.1Annual reviews are both a process as well as a meeting of relevant people and are usually held in the education setting attended. The setting will arrange and conduct the Annual Review meeting.

4.2 Where a child or young person does not attend an educational setting, the local authority will conduct the review at a mutually convenient location.

4.3 Reviews must be undertaken in partnership, with the child or young person at the centre of this process, with their parent/carer involved in the discussions and decisions along with professionals. The review must take account of their views, wishes and feelings and this should be clearly recorded on the Annual Review proforma. The review should support the child or young person to be aspirational for their future.

4.4 To support professionals to plan attendance at review meetings and/or provide advice or information about the child or young person where necessary, the Local Authority will provide a list of children and young people requiring an Annual Review in the forthcoming full term to:

* all Headteachers/ Principals of the identified provision.
* to the ICB.
* to local authority officers responsible for social care for children and young people with SEN or disabilities including children’s social care, adult social care and Inspire services.
* See 5.2 for Phase Transfer Reviews

4.5 Settings are asked to use the standard **Annual Review** pro-formas provided by Hammersmith & Fulham Council to document the meeting. These are uploaded to the Local Offer (add link once finalised)

4.6 It is the responsibility of the setting to ensure clarity in the annual review report which must set out:

* recommendations for any amendments required to the EHC plan which are clear, quantifiable and based on the available evidence.
* any difference between the educational provider’s recommendations and those of others attending the Annual Review.

4.7 This should be returned to the EHC Casework Team **within 2 weeks** of the Annual Review meeting.

4.8 Within **four weeks** of the review meeting the EHCP Casework Team must decide whether it proposes to keep the EHC plan as it is, amend it, or cease to maintain it. The child’s parents/young person and the educational provider should all then be notified.

4.9 Where an EHC plan is to be amended the EHCP Casework Team must issue the amended EHC plan within 8 weeksof the decision to amend letter.

**5. Timings of Annual Reviews**

5.1 EHCPs must be reviewed at least every 12 months with the process to be completed on or before the anniversary of when the EHCP was first issued or the anniversary of the last review. The dates of the meeting and any other actions must allow the local authority to complete its part of the review by the 12-month deadline. Where a child is under 5, additional reviews should be undertaken within every six months.

5.2 **Timings of Phase Transfer Annual Reviews**

All phase transfer annual reviews should be held in the summer term of the previous academic year before the year of transition. The phase transfers are:

* early years provider to school
* primary school to secondary school
* year 11 or above to a new setting or provider

This enables the local authority to name the next setting by the statutory deadline of 15th February for school age phased transfer and 31st March for post 16 movers on in the year of transfer.

**6. Local authority strategic approach to attendance at Annual Reviews**

As a local authority, we will prioritise specific annual reviews for attendance by EHC Coordinators. These include:

* Phase transfer
* Year 9
* For post 16: any transition review where a programme of study is coming to an end.
* Where a child or young person has been released from custody. This should involve the Youth Justice Service in agreeing appropriate support and opportunities.
* Where there is considerable concern regarding the child/young person’s progress or access to learning.
* Where placements are considered to be vulnerable as a result of complex and/or significant needs.
* Where there has been a significant change in need.
* Where a child/young person has recently moved into the local area.

If the child/young person is known to Continuing Care, Dynamic Support Register (DSR), Section 117 Mental Health Services or is a child who is looked after, annual reviews should ensure the wider network is involved in planning and coordinating the provision needed.

**7 Year Group**

It is expected that the child or young person will remain within the year group appropriate for their chronological age. Where there are compelling reasons why they should remain in the same year group for a second year, this should be included in the Annual Review. Settings are asked to consider the implications of such a recommendation, particularly with reference to phase transfer, where a receiving setting cannot be compelled to observe a previous decision to move a child into a different year group.

**8 Electively Home Educated Children and Young People**

Where local authorities and parents agree that home education is the right provision for a child or young person with an EHC plan, the plan should make clear that the child or young person will be educated at home. If it does the local authority must arrange the special educational provision set out in the plan. (COP 10.31)

In cases where the EHC plan gives the name of a school or type of school where the child will be educated and the parents decide to educate at home, the local authority is not under a duty to make the special educational provision set out in the plan provided it is satisfied that the arrangements made by the parents are suitable. The local authority must review the plan annually to assure itself that the provision set out in it continues to be appropriate and that the child’s SEN continue to be met. (COP 10.32)

EHC Coordinators should arrange to review the EHCP of electively home educated children and young people at least annually. Flexible arrangements for the meeting may be required, depending on each individual circumstance.

**9 How to consider amendments**

EHCPS are not expected to require frequent changes and updates. When they do need amending, there should be supporting evidence to inform any changes.

**10** **Requesting an early Review**

An early review can be requested via the EHC Casework Team if the educational setting, family or young person believe that a significant change requires it. Reasons for this may include:

* concern regarding the child/young person’s attendance and access to education.
* a significant change in the child/young person’s presentation.
* concern that educational provision contained within the EHC Plan is not being delivered.

**Toolkit 1: Annual Review Timetable**

|  |
| --- |
| The SEND Code of Practice requires that the whole Annual Review process is completed **within 12 months** of the date of issue of the EHC plan or previous review. *CoP 9.169.* In practice this means that the Annual Review date must be at least 4 weeks in advance of the EHCP issue date or previous review date. |

|  |  |  |
| --- | --- | --- |
| **Step 1** | | |
| **At least 6 weeks before the planned meeting date** |  | Request advice and information about the CYP from all the relevant professionals and the parent and the CYP themselves |
| **Step 2** | | |
| **2 weeks before the planned meeting date** |  | Circulate the reports received along with the invitations to attend the Annual Review meeting. |
| **Step 3** | | |
| **Planned meeting date** |  | The Annual Review meeting will consider:   * the CYP’s progress towards achieving the outcomes specified in their EHC plan. * whether the outcomes still remain appropriate. * if their aspirations have changed. * review and set new short-term targets. * whether any changes need to be made to the provision including if the placement is still appropriate. |
| **Step 4** | | |
| **Within 2 weeks of the date of the meeting** |  | Following the meeting the school (or host) must prepare a report that includes any recommendations for amendments to the EHCP including details where views differ. This must be sent to everyone invited to the meeting within 2 weeks including the local authority. |
| **Step 5** | | |
| **Within 4 weeks of the date of the meeting** |  | The Local Authority has 2 weeks (4 weeks from the date of the meeting) to decide:   * to leave the plan unchanged, * to amend the plan * to cease the plan * inform the parent, the YP and the school/setting of its decision |
| **Step 6 where required** | | |
| **Within 8 weeks of a decision to amend** |  | Where an EHC plan is to be amended the EHCP Casework Team must issue the amended EHC plan within 8 weeksof the decision to amend letter. |

**Toolkit 2: Frequently Asked Questions Relating to Annual Reviews**

| **Frequently asked question** | **Response** |
| --- | --- |
| **By when must the Annual Review Process be completed?** | The SEND Code of Practice (9.169 ) states that the first review must be held within 12 months of the date when the EHC plan was issued, and then within 12 months of any previous review, and the local authority’s decision following the review meeting must be notified to the child’s parent or the young person within four weeks of the review meeting and within 12 months of the date of issue of the EHC plan or previous review.  In practice this means that the Annual Review date must be at least 4 weeks in advance of the EHCP issue date or previous review date. |
| **Who must be invited to an Annual Review?** | 1. *The parents/carers who have parental responsibility*. If the child or young person is looked after by the LA, the residential care worker or foster parents and the child’s social worker, as appropriate. 2. *The child or young person*. It is good practice to involve the child or young person in their annual review; consideration should be given as to whether they will require support in the meeting and/or it may be appropriate for them to be present for all or a part of the meeting or for their views to be gathered beforehand.   Consideration should be given as to the best way of capturing the child/young person’s voice and creative methods encouraged to support this eg need for visuals/drawing/ writing.  Settings must inform the child, young person, parents and/or carers that they may bring an adviser, friend, relative or an independent parental supporter to the review meeting.   1. *The Headteacher/Principal* responsible for overseeing the provision of education for the child in question; in practice, such attendance is usually delegated to the *Special Educational Needs Co-ordinator* (SENCO). 2. A representative of the EHC Team of the local authority, usually the *EHC Coordinator* 3. *Relevant health care professionals* to provide advice about the child's health care needs and provision, as required. Examples include a CAMHS professional, GP, school nurse, community nurse, continuing care professional. This will be specific to each child/young person. If the child/young person is cared for by the local authority, this should include the relevant designated health professionals and their health plan should be included as part of the discussions. 4. A *relevant social care professional* eg the allocated social worker, a short breaks worker, Social Care Occupational Therapist.   In addition, consideration should be given to inviting the following people as appropriate:   1. An *Educational Psychologist* (EP) if a significant change in needs has become evident (e.g. indicating a change in level of provision or type of placement). If they are working with the child/young person as a direct result of the EHC Plan. Schools may also invite an EP to the review where the EP has had direct involvement with the child/young person during the proceeding months (e.g. via school commissioned time). 2. Schools should consider where attendance of the *SEN Occupational Therapist and Speech and Language Therapist* is particularly required. They may not be able to attend all ARs but will provide reports. 3. A *specialist teacher* where the child/young person has a sensory impairment 4. A *specialist teacher* where the child/young person has communication and interaction needs 5. Where the child/young person is placed in the setting by *another local authority*, a representative of that local authority. 6. Any other person suggested by the parents/carers as having involvement with the education, health care or social care of the child/young person.   If the child/young person is known to Continuing Care, Dynamic Support Register (DSR), Section 117 Mental Health Services or is a child who is looked after, annual reviews should ensure the wider network is involved in planning and coordinating the provision needed.  It is unlikely that all the relevant professionals will be able to attend all review meetings. It is helpful, when inviting professionals from outside the setting, to indicate the importance attached to their attendance. |
| **Who should we ask to provide written advice in preparation for the meeting?** | * In preparing for the meeting, the setting must write to the young person and their parent/carer inviting them to contribute their views, wishes and feelings. This should include their view of the current arrangements and provide an opportunity to discuss changes which the young person/parent may want to be made to the EHCP. The setting should offer assistance if required including supportive work with the child/young person to prepare for their annual review. * Settings are asked to stress that written advice is required from persons invited but unable to attend the meeting. If the attendance of a particular person is thought essential, then that person should be consulted before fixing the date of the meeting. * On receipt of the relevant advice, the setting is then asked to complete the annual review document, and to send it together with all the advice received to all invited to attend the review meeting. This should be done at least two weeks before the date of the meeting. * For children who are in the care of the local authority (CLA), the review of the personal education plan (PEP) and health plan should be integrated into the annual review where possible. |
| **How can we make sure we receive requested advice on time?** | Proactive planning by the setting and the involvement of parents/carers and agencies involved in supporting the child in pre-planning will help ensure a timely and effective Annual Review process.   * The Regulations require that at least two weeks' notice must be given of the date of the meeting. In practice, longer notice is required to allow time for the appropriate documentation to be collected and circulated.  To secure reports and attendance by health and social care colleagues, a longer notice period is advisable. (see AR timetable) * To enable professionals to plan attendance at review meetings and/or provide advice or information about the child/young person, the Local Authority will provide a list of children and young people requiring an Annual Review in the forthcoming full term. |
| **How can we ensure that review meetings are person-centred?** | The Children and Families Act sets out clear principles for supporting and involving children and young people in all aspects of the support and planning of their special educational need.  What is Person Centred Planning?  Person centred planning aims to put children and young people at the centre of planning and decisions that affect them. When children are meaningfully involved, this can change their attitude, behaviour and learning and make them active partners who work with adults to bring about change.  Person-centred planning aims to:   * Put children and young people at the centre of planning and decisions that affect them. * Bring people together – both to celebrate successes, and also to address difficulties with honesty and care. * With creative and reasonable adjustments, help children and young people learn how to express their views. * Show children and young people that they are listened to, respected, valued and cared for – that their voice matters. * Help adults get to know the children and young people they work with and give insight into the impact they are having on children and young people’s lives. The adults’ role is to empower the child or young person; to promote their independence and enable them to do things for themselves, wherever possible. * Make plans that build towards meaningful and positive outcomes for children and young people and their families   The annual review process is a way of learning what is important to and for the child/young person and drawing upon the knowledge and experience of those who are important in the child/ young person’s life including the family.  A person-centred review looks at:   * What we appreciate, like and admire about the child/young person * Their aspirations for the future * What is important to them (and their assessed needs) * What good support looks like * What is working and not working from different perspectives   Further information on supporting and preparing a child/young person for a review meeting is available in the Annual Review Resources section of the Local Offer. |

**Toolkit 3: EHCP Checklist for Annual Review**

All sections of the EHCP should be checked at the Annual Review

| **EHCP Section** | **Check** |
| --- | --- |
| A | Aspirations should be checked to see if they remain the same. There may be additional aspirations to be included perhaps due to new experiences, interests or circumstances. |
| B | New needs may have emerged, or existing needs changed and/or are having an impact on other areas of their life (in or out of school). The parent or child/young person may not feel their needs are described accurately or to be a true representation of who they are. Some content may be dated and require amending (such as previously recorded academic levels). |
| C | There may be a new diagnosis or on-going investigations. Health conditions and resulting needs included may have changed or may not have been sufficiently described in the current EHCP. Any new Health advice covering health needs should be sought and incorporated as appropriate. |
| D | A change of circumstances may have occurred or a first or more up to date assessment may now have been completed, describing Social Care needs that should be included. The parent/carer/young person may have requested an assessment of their Social Care needs since the last EHCP was issued or in the context of the Review which should be considered in the amending of the EHC Plan. |
| E | Outcomes are not annual targets – they are set looking forward to the end of the key stage or beyond - but they still need to be reviewed to check they are still relevant, made more specific and measurable or may have changed. (Short-term targets will also be reviewed and new targets set). Outcomes must be specific, measurable, achievable, realistic and time bound (SMART).  It may help in writing and proposing these in the Review meeting, to imagine future reviews and how measurable the outcome will be, in later considering whether or not the outcome has been achieved.  If outcomes require amending, this should be recorded on the EHC Plan directly using the established key.  If the Review established that a child/young person has achieved their education and training- based outcomes or that support can now be met within delegated resources, a discussion with the child/young person/family should take place and consideration made by the local authority as to whether to cease the EHC Plan. |
| F | There should be provision to match each need included in Section B defined as:   * For children under two, it is any form of educational provision * For children over two, it is education or training that is different, or additional, to that ordinarily available in a mainstream setting.   Provision must be detailed and specific and normally quantified in terms of the type, hours and frequency of support and level of expertise including clarity as to whether the support is provided through a personal budget. |
| G | There should be provision to meet each need included in section C  Most provision included in G is provided by local services as part of the local offer. Any additional provision requires agreement from the ICB. Any health provision, such as Speech and Language Therapy, that can be considered to ‘educate or train’ must be included in Section F. |
| H1 and H2 | Any provision included here will depend on what Social Care needs, if any, have been included in Section D. It must be reviewed and may have already changed since it was originally included. |
| I | School placement. The parent/young person may want to ask for a different school or type of school if they believe it will provide a better match to their child’s/their needs. |
| J | Any Personal Budget already in place should be reviewed particularly where provision has been amended. This is also an opportunity to request a Personal Budget if the parent/young person would like one. |

**Toolkit 4: Annual Reviews - Preparing for Adulthood (PfA)**

Young people have told us what is important to them about planning for adulthood and the annual review provides an opportunity for the child or young person to discuss with their family, educational setting and services how we can support them to achieve their life goals including greater independence and employability.

From Year 9 onwards, the local authority has a duty to ensure that the annual review meeting considers what provision is required to assist the child or young person in preparation for adulthood and independent living. This must include preparation for the further education sector, work-based training, higher education and adult life. Schools have a key role in providing high-quality Careers Information, Advice and Guidance (CIAG).

There may be good reasons to start planning for adulthood sooner than Year 9 and the Code suggests that it can be helpful for EHC plan reviews before Year 9 to have this focus too.

The review must be driven by the young person’s outcomes, ambitions and aspirations to ensure a ‘person centred’ transition into adulthood. Planning must be centred around the individual and explore the child or young person’s aspirations and abilities, what they want to be able to do when they leave post-16 education or training and the support they need to achieve their ambition. Transition planning **must** be built into the revised EHC plan and should result in clear outcomes being agreed which will prepare young people for adulthood.

It is important the child or young person themselves can give their views and cover the topics they think are important. Some helpful resources to assist with this are:

* The Council for Disabled Children [guide to help young people prepare for annual reviews](https://councilfordisabledchildren.org.uk/sites/default/files/field/attachemnt/CYP.4pp.HI-RES.pdf)
* Preparing for Adulthood's [checklist](https://councilfordisabledchildren.org.uk/sites/default/files/uploads/attachments/annual%20reviews%20from%20year%209.pdf) for key topics to cover at annual reviews for children and young people from [year 9 onwards.](https://beta.lbhf.gov.uk/sites/default/files/2023-07/hf-send-16_route-planner.pdf)
* [16+ Route Planner](https://beta.lbhf.gov.uk/sites/default/files/2023-07/hf-send-16_route-planner.pdf) for young people with SEND and their families.

Copies of these and other useful resources are available on the Local Offer.

Where the young person has a learning disability it is important to ensure that the young person is on the register for an annual health check.

It would be helpful to ensure the YP:

* is being discussed at the Transition Tracking meeting to ensure there is a clear pathway towards adulthood.
* there is a clear pathway in place for the services which will be assisting the young person in adulthood.

The outcomes sought for a young person must be ambitious and stretching. This is particularly important when thinking about education or training for young people aged 19-25 where provision tends to be more bespoke.

For young people moving between post-16 institutions, where a young person is expected to transfer to a new institution in the new academic year, the EHC Plan naming the planned new setting must be issued on or before the 31 March. The Review process must then take place well in advance of this and wherever possible, the Review meeting should be brought forward to the summer term of the previous academic year (for example, the summer term of Year 10 if the young person is expected to transition to a new setting after Year 11).

The Code of Practice has some useful examples of what Preparing for Adulthood might be:

* support to prepare for higher education and/or employment;
* training options such as supported internships, apprenticeships, and traineeships;
* support in finding a job, and learning how to do a job (for example, through work experience opportunities or the use of job coaches);
* help in understanding any welfare benefits that might be available when in work;
* preparation for independent living including where the child or young person wants to live in the future, who they want to live with and what support they will need;
* considering local housing options including housing benefits and social care support available;
* support in maintaining good health in adult life;
* support in participating in society: this is a wide-reaching concept and includes such things as understanding how to get about (using transport and benefits options relating to this) and making and maintaining relationships.

If a young person has an EHC plan and is aged under 18 but is not receiving education and training (for whatever reason), the local authority **must** review the plan to ensure that the young person continues to receive education or training.

**Toolkit 5: Annual Review Meeting Advice and Attendance List**

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| --- | --- | --- | --- | --- | --- |
| **Annual Review Advice and Attendance List** | | | | | |
| **Designation of Attendee** | **Name** | **Advice requested (✓)** | **Advice received**  **(✓)** | **Attended AR**  **(✓)** |
| Child/Young Person |  |  |  |  |
| Parent/Carer |  |  |  |  |
| Parent Carer |  |  |  |  |
| Other Relative/ Friend |  |  |  |  |
| Headteacher/Principal |  |  |  |  |
| Deputy/Assistant Headteacher |  |  |  |  |
| SENCO |  |  |  |  |
| Specialist Teacher |  |  |  |  |
| Class teacher |  |  |  |  |
| LA EHC Coordinator |  |  |  |  |
| Social Care professional |  |  |  |  |
| Education Psychologist |  |  |  |  |
| Physiotherapist |  |  |  |  |
| Speech & Language Therapist |  |  |  |  |
| Occupational Therapist |  |  |  |  |
| School Nurse |  |  |  |  |
| CAMHS Professional |  |  |  |  |
| *Add/delete as relevant* |  |  |  |  |
|  |  |  |  |  |
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**Toolkit 6: EHC Casework Team Contacts List**

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| --- | --- | --- | --- |
|  |  | **Email** | **Phone No.** |
| Duty Line | Between  9.30am - 4.30pm | [SEND@lbhf.gov.uk](mailto:SEND@lbhf.gov.uk) | 020 8753 1021 |

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Email** |
| Jack O’Donoghue | Service Manager | [Jack.O’Donoghue@lbhf.gov.uk](mailto:Daryle.Mathurin@lbhf.gov.uk) |
|  |  |  |
| Sheila Hippolyte | EHC Team Leader | [Sheilah.Hippolyte@lbhf.gov.uk](mailto:Sheilah.Hippolyte@lbhf.gov.uk) |
| Ayesha Begum (0-13) | EHC Coordinator | [ayesha.begum@lbhf.gov.uk](mailto:ayesha.begum@lbhf.gov.uk) |
| Ruby Brown (14 – 25) | EHC Coordinator | [ruby.brown@lbhf.gov.uk](mailto:ruby.brown@lbhf.gov.uk) |
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| Jack Broadbent (0-13) | EHC Coordinator | [jack.broadbent@lbhf.gov.uk](mailto:jack.broadbent@lbhf.gov.uk) |
| Christine Norbert (14-25) | EHC Coordinator | [christine.norbert@lbhf.gov.uk](mailto:christine.norbert@lbhf.gov.uk) |

This list will be kept updated on the Local Offer under the Annual Review section.

**Toolkit 7: Annual Review Report Template (up to year 8)**

**EDUCATION, HEALTH AND CARE PLAN**

**ANNUAL REVIEW REPORT**

Please insert an image chosen by the child / young person

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Description automatically generated

NAME OF CHILD / YOUNG PERSON

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **This review has been completed by** | | | | |
| Name: |  | | Designation: |  |
| Name of Educational Setting: | |  | | |
| Provision map included (please circle) | | | Yes | No |

|  |  |
| --- | --- |
| Date of the Annual Review |  |
| Date this report was sent to the LA |  |

GENERAL INFORMATION

Please highlight any information that has changed from that which is provided in the current Education, Health and Care Plan

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Child / Young Person Information** | | | | | | |
| Name: |  | | | | | |
| Home Address: |  | | | | | |
| Date of Birth: | Click to enter D.O.B | | Gender: | | |  |
| Ethnicity |  | | Religion: | | |  |
| Languages spoken at home |  | | Is an interpreter required? | | |  |
| **Parent /carer 1 Information** | | | | | | |
| Name: |  | | | | | |
| Address: |  | | | | | |
| Telephone: |  | | | | | |
| Email: |  | | | | | |
| Parent /carer 2 Information | | | | | | |
| Name: |  | | | | | |
| Address: (if different from above) |  | | | | | |
| Telephone: |  | | | | | |
| Email: |  | | | | | |
| **GP contact Information** | | | | | | |
| Name of GP: | |  | | NHS Number: |  | |
| Address of GP: | |  | | | | |

|  |  |  |
| --- | --- | --- |
| **Social Care Indicators: is the child / young person…** | | |
| Looked after by the Local Authority? | Yes | No |
| Subject to a Child Protection Plan? | Yes | No |
| Identified as a Child in Need? | Yes | No |

Please identify all education, health and care professionals involved in supporting the child/ young person and attach reports where available.

*Please add further rows as necessary*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name of professionals involved | Service | Email | Invited to Annual Review? | Attended Annual Review? |
| **Health Professionals involved** | | | | |
|  | CAMHS |  |  |  |
|  | Continuing Care |  |  |  |
|  | School Nurse |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  | |
| **Education Professionals involved** | | | | |
|  | Educational Psychologist |  |  |  |
|  | Speech and Language Therapist |  |  |  |
|  | Occupational Therapist |  |  |  |
|  | INSPIRE specialist |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **Social Care Professionals involved** | | | | |
|  | Children’s Social Worker |  |  |  |
|  | Adults Social Worker |  |  |  |
|  | Shortbreak worker |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**SECTION A**

ALL ABOUT ME

Please use the following as suggestions for a conversation around achievements and aspirations. It is by no means a comprehensive list and can be used to record any relevant comments that the child / young person wishes to add. Please use resources such as the ‘Person Centred Reviews for Schools’ book to develop the information for this section.

|  |
| --- |
| My achievements and successes over the past year |
|  |

|  |
| --- |
| What my family would say are my key achievements and successes over the past year |
|  |

|  |
| --- |
| What my school /college would say are my key achievements and successes over the past year |
|  |

**THE FUTURE**

|  |
| --- |
| My aspirations and goals for the future: |
|  |

|  |
| --- |
| Things I like about me now |
|  |

|  |
| --- |
| Things others like about me now |
|  |

|  |
| --- |
| Things I’m good at now |
|  |

|  |
| --- |
| What is working well for me now |
|  |

|  |
| --- |
| Things I now like |
|  |

|  |
| --- |
| Things I now don’t like |
|  |

|  |
| --- |
| What I’d like to change |
|  |

|  |
| --- |
| How I need to be supported to be heard and understood |
|  |

|  |
| --- |
| Did anyone help me with this part? If so, what is their name and how did they help? |
|  |

**SECTION B**  
IDENTIFYING ANY CHANGES TO MY EDUCATION, HEALTH AND CARE NEEDS

|  |
| --- |
| COGNITION AND LEARNING |
| What can Name of the Young Person do now that she/he could not do at the time of the last review? If there has been no progress please explain the reason(s) why. |
|  |
| Any changes to Name of the Young Person’s special educational needs? |
|  |

|  |
| --- |
| COMMUNICATION AND INTERACTION |
| What can Name of the Young Person do now that she/he could not do at the time of the last review? If there has been no progress please explain the reason(s) why. |
|  |
| Any changes to Name of the Young Person’s special educational needs? |
|  |

|  |
| --- |
| SENSORY AND/OR PHYSICAL |
| What can Name of the Young Person do now that she/he could not do at the time of the last review? If there has been no progress please explain the reason(s) why. |
|  |
| Any changes to Name of the Young Person’s special educational needs? |
|  |

|  |
| --- |
| SOCIAL, EMOTIONAL AND MENTAL HEALTH |
| What can Name of the Young Person do now that she/he could not do at the time of the last review? If there has been no progress please explain the reason(s) why. |
|  |
| Any changes to Name of the Young Person’s special educational needs? |
|  |

**PROGRESS AND LEVELS OF ATTAINMENT OVER TIME**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| SATS or teacher assessments | Outcomes of any previous assessments | Date of previous assessments | Outcomes of most recent assessments | Date of most recent assessments |
| End of  foundation stage assessments /baseline assessments |  |  |  |  |
| Reading |  |  |  |  |
| Writing |  |  |  |  |
| Comprehension |  |  |  |  |
| Mathematics |  |  |  |  |
| Science |  |  |  |  |
| Others Please specify (e.g. vocational) |  |  |  |  |

**ATTENDANCE RECORD DURING THE PAST YEAR**

|  |
| --- |
| Please provide the percentage of authorised and unauthorised attendance, along with any other relevant information. |
|  |

**SECTION C**

HEALTH

|  |  |  |
| --- | --- | --- |
| Has the child’s / young person’s health needs changed in the last year? | Yes | No |
| Current health package is: |  | |
| If the health needs have changed, please indicate how? | | |
|  | | |

**SECTION D**

SOCIAL CARE

|  |  |  |
| --- | --- | --- |
| Has the child’s / young person’s care needs changed in the last year? | Yes | No |
| Current health package is: |  | |
| If the health needs have changed, please indicate how? | | |
|  | | |

REVIEW OF CURRENT OUTCOMES IN EHCP

Please use the following to discuss progress towards and achievements made regarding the current outcomes within the young person’s EHCP.

|  |  |  |
| --- | --- | --- |
| Outcome | Achieved / Partially met / Not achieved | Reason (Please attach relevant reports) |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| Can the outcomes for the next year/stage be met through the local offer? | Yes | No |
|  | | |

|  |  |  |
| --- | --- | --- |
| Is an education, health and care plan still required? | Yes | No |
|  | | |

**SECTION E**

OUTCOMES FOR THE NEXT YEAR

Please only complete this section if an EHC Plan is required

An outcome is described as “the benefit or difference made to an individual as a result of provision”

|  |
| --- |
| **1-** |
| Steps towards the outcome? |
|  |
| Strategies to support Name of the Young Person’s to make measurable progress |
|  |

|  |
| --- |
| **2-** |
| Steps towards the outcome? |
|  |
| Strategies to support Name of the Young Person’s to make measurable progress |
|  |

|  |
| --- |
| **3-** |
| Steps towards the outcome? |
|  |
| Strategies to support Name of the Young Person’s to make measurable progress |
|  |

|  |
| --- |
| **4-** |
| Steps towards the outcome? |
|  |
| Strategies to support Name of the Young Person’s to make measurable progress |
|  |

|  |
| --- |
| **5-** |
| Steps towards the outcome? |
|  |
| Strategies to support Name of the Young Person’s to make measurable progress |
|  |

PROVISION

All Annual Reviews should consider the appropriateness of the level of support attached to the EHCP. Schools/Colleges/Providers need to consider whether the current level of provision is necessary. The LA will review all the provision and decide whether the level of support should remain the same, decrease or increase. The LA will scrutinise any new outcomes to ensure that they require additional resources or if they can be met with SEN School Support and/or Quality First Teaching. The LA will also consider if it should cease to maintain the EHCP.

|  |  |  |  |
| --- | --- | --- | --- |
| Questions | YES | NO | Reason (Please attach any relevant reports) |
| Are the outcomes deliverable through school SEN Support and Quality First Teaching? |  |  |  |
| Should the LA continue to maintain the EHCP? |  |  |  |
| Does the EHCP need to be amended? (Please specify which sections require amendments) |  |  |  |
| Is there a shared understanding of how the current support is being used? |  |  |  |
| Is a change in the level of support required?  **(Please attach an individual provision map)** |  |  |  |

|  |
| --- |
| The Annual Review report should reflect the views of everyone at the meeting and not just the consensus. Please record here any different views that any attendees have expressed. |
|  |

|  |  |  |
| --- | --- | --- |
| **Safeguarding** | | |
| Have any safeguarding concerns been raised during the Annual Review? | Yes | No |
| If you have answered Yes, please state what the concerns are and what action is to be taken and by whom? | | |
|  | | |

**SECTION I**

|  |  |  |  |
| --- | --- | --- | --- |
| **EDUCATION PLACEMENT** | | | |
| Name of current setting: |  | | |
| Type of current setting: |  | | |
| Is there any evidence the current placement is no longer appropriate? | | | Yes / no |
| If you answered yes above, please outline why the current placement can no longer meet the needs of the young person. | | | |
|  | | | |
| Please provide the Headteacher’s / Principle’s report including any reasonable adjustments already made: | | | |
|  | | | |
| Is the child / young person due to move school at the end of the next academic year? | | | Yes / no |
|  | | | |
| Name of school / college / training provider (if known) | |  | |
| Date of expected transfer | |  | |

|  |  |  |
| --- | --- | --- |
| **PERSONAL BUDGET** | | |
| Has a personal budget been requested by the parents/carers or young person? | Yes | No |
| If yes, please specify the details of the request |  | |

SIGNED ON BEHALF OF THE SCHOOL / EDUCATION SETTING  
  
Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Job Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

APPENDIX 1  
REPORTS AND ASSESSMENTS

Below is a list of all reports and assessments that have been used to help write this plan.

|  |  |  |
| --- | --- | --- |
| Report / assessment | Name / role of author / contact details | Date of report |
| Child / parent additional advice |  |  |
| Educational advice |  |  |
| Medical advice |  |  |
| Psychological Advice |  |  |
| Social Care Advice |  |  |
| Advice from others |  |  |
| LA Advice since the last assessment |  |  |
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**Toolkit 8: Annual Review Report Template (year 9 or above)**

**Not yet attached – subject to amendment**

**Toolkit 9: Health responsibilities for consideration for Transition to Adult Services**

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| **Health Responsibilities Checklist** |
| Does the young person have a Learning Disability? If yes, has the GP been informed? |
| Does the family understand what Adult Health Care is and the change in way health services are offered from children to adults’ services? Has the family asked the GP about Adult Health Care from age 14? |
| Is the young person eligible for Adult Continuing Health Care? |
| Is the young person a child in care? |
| Does the young person require support for mental health needs? |
| Is the young person on the dynamic support register (DSR)? |
| If the young person has mental capacity does he/she/they have understanding about their own condition and managing medication / making appointments etc? |
| If the young person lacks mental capacity has the parent / carer been informed they have to be appointed as a deputy by the Court of Protection to make health decisions after the young person turns 18? |
| Is the young person on the Transition Tracker? |
| **EHCP** |
| Have PfA outcomes been included in the EHCP /Annual Review? |
| Have health reports specified provision needed for college (noting it may be different from what is available in school)? |
| Is provision health/education provision? Is this made clear in EHCP? Have appropriate referrals been made? |
| **What recommendations are required in future educational setting?** |
| Is a health care plan required for epilepsy? Who will provide this in adulthood? |
| Is a health care plan required for diabetes? Who will provide this in adulthood? |
| Is a health care plan required for suctioning? Who will provide this in adulthood? |
| Is a health care plan required for dysphagia? Who will provide this in adulthood? |
| Is a health care plan required for gastrostomy? Who will provide this in adulthood? |
| Is a health care plan required for a tracheostomy? Who will provide this in adulthood? |
| Is a health care plan required for manual handling? Who will provide this in adulthood? |
| Will college staff require training? Who will provide this? |
| Will the college need to make reasonable adjustments eg manual handling / hoisting / visual timetables? |
| Is equipment required for the young person to access college? Has this been ordered? Who will support setting up / adjustment? |
| Does equipment need to be moved from school to college? |
| Does the young person require a 1:1 to support health needs / safety? Is this made clear in EHCP and communicated to college? |
| Is a referral to an adult health professional required? |
| Is transport support required? |

**10. Useful Resources available on the Local Offer**

1. Person Centred Planning powerpoint from the Educational Psychology Service
2. West London Guide to Supported Internships 2023
3. Council for Disabled Children Guide for CYP: Preparing for an Annual Review
4. Preparing for Adulthood: Key topics to cover at annual reviews from year 9.
5. Planning for Adulthood - Outcomes across the age ranges
6. Planning for Adulthood – supporting planning and writing good PfA outcomes
7. NDTI Vocational Profile