



Telford & Wrekin  
COUNCIL

Annual Review guidance and  
additional documentation for  
education settings and  
professionals

# Annual Review of an EHCP

## GUIDANCE

The following guidance and new Annual Review forms have been produced to support educational settings when carrying out Live Annual Reviews. This follows a successful pilot of the Live Review process between Autumn Term 2019 and Summer Term 2020.

Following the Pilot process, the LA has decided to roll out 'Live' reviews to all schools / settings and there is an expectation that 'Live' reviews will become the norm in all settings from after October half term 2020 (other than for exceptional circumstances when the non-live review templates can still be used until the end of the Autumn term 2020).

There have been some minor amendments to the review documentation and so it is recommended that you download the updated templates which can be found on the Local Offer at [www.telfordsend.org.uk](http://www.telfordsend.org.uk)

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**Section 1 (page 2):** [Guidance document on the process required for Annual Reviews.](#)

**Section 2 (page 12):** [Guidance document to support specifically with the completion of a 'Live' Annual Review.](#)

**Section 3 (page 18):** [Annual Review template for 'Live reviews' up to and including Year 8.](#)

**Section 4 (page 21):** [Annual Review template for 'Live' reviews year 9 and above.](#)

**Section 5 (page 24):** [Appendices \(including child's/young person's views, parent/carer views, additional banding templates for special schools, Social Care advice template and pilot evaluation form\).](#)

## Section 1.



Telford & Wrekin  
COUNCIL

Telford and Wrekin Local Authority.

Guidance on the Annual Review process  
for an Education, Health and Care Plan.

Contents of Section 1 guidance document:

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## Introduction

This guidance aims to provide advice and support to educational practitioners, principally, special educational needs co-ordinators (SENCo's), who have day-to-day responsibility for the operation of the SEN Policy and the co-ordination of Annual Reviews of pupils with Special Educational Needs.

**Please also refer to Chapter 9 of the SEND Code of Practice Sections 9.166 to 9.185 for guidance regarding the Annual Review process...**

*“EHC plans should be used to actively monitor children and young people’s progress towards their outcomes and longer term aspirations. They must be reviewed by the local authority as a minimum every 12 months. Reviews must focus on the child or young person’s progress towards achieving the outcomes specified in the EHC plan. The review must also consider whether these outcomes and supporting targets remain appropriate.” (SEND Code of Practice 2015, Section 9.166)*

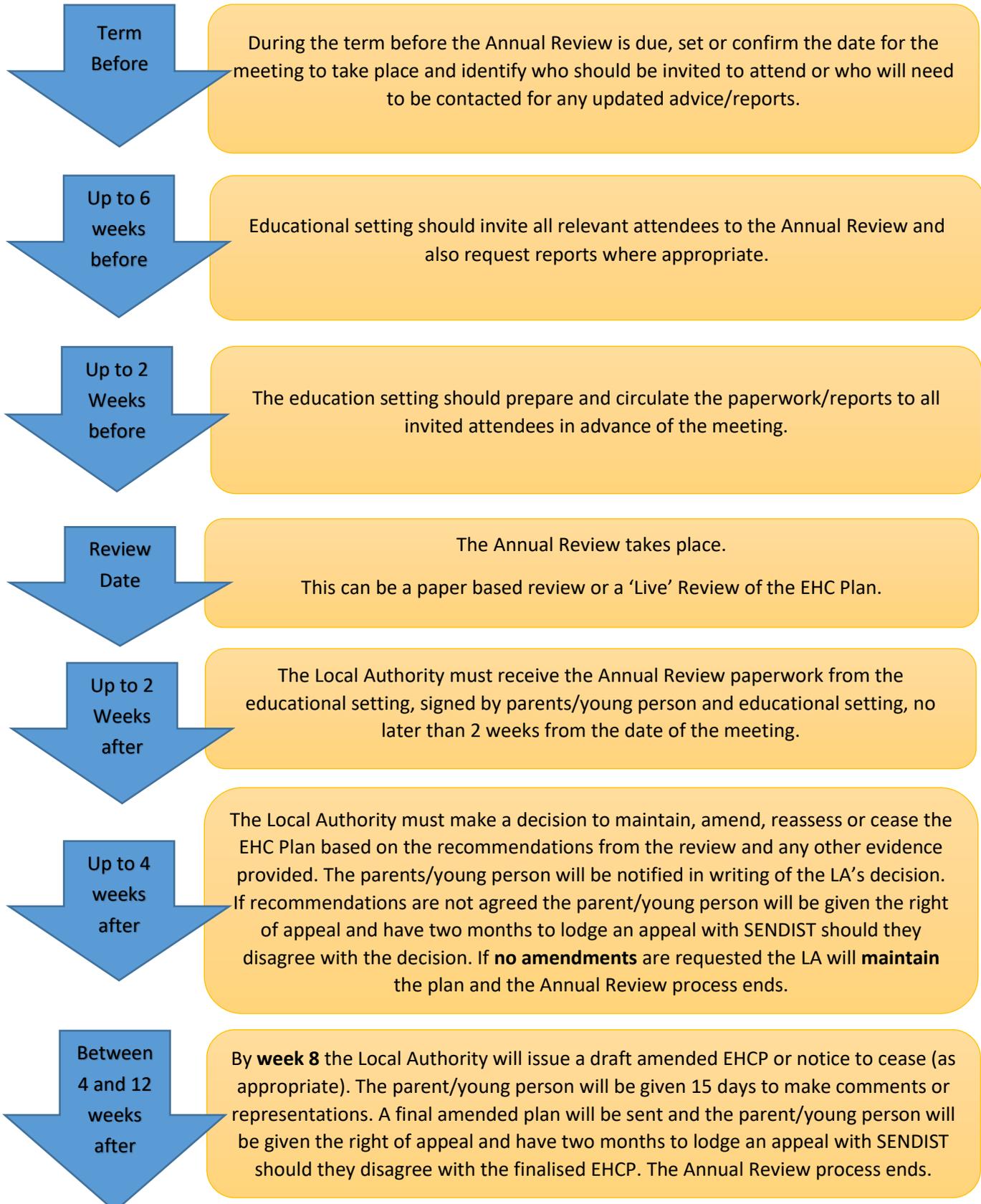
*“As part of the review, the local authority and the school, further education college or section 41 approved institution attended by the child or young person must cooperate to ensure a review meeting takes place.” (SEND Code of Practice 2015, Section 9.173)*

The LA has a duty to ensure that Annual Reviews take place, however, in Telford and Wrekin the Local Authority has delegated responsibility for arranging and carrying out the Annual Reviews to the individual Schools/Settings.

**All Annual Review documentation can be found on our Local Offer –**

[https://www.telfordsend.org.uk/downloads/download/55/annual\\_review\\_documentation](https://www.telfordsend.org.uk/downloads/download/55/annual_review_documentation)

# EHCP Annual Review Process



## When should an Annual Review take place?

The first review must be held **within 12 months** of the date when the original EHCP was issued. Subsequent reviews will be held within 12 months of any previous review.

A review can be requested at any time by parent/young person\*/setting/practitioner if there are any **significant** changes of circumstance.

For children between the ages of 0-5 the Local Authority recommends reviewing the EHCP after 6 months to ensure the provision and supports remains appropriate. This review does not need to be submitted to the local authority, but must be produced ready for the Annual Review.

For looked after children the Annual Review should, if possible and appropriate, coincide with one of the reviews of their Care Plan and in particular the personal education plan (PEP) element of the Care Plan.

For a young person detained in custody, the provision put in place during their time in custody will be monitored at least annually. A monitoring meeting will take place which should consider the special educational and health provision arranged for the detained person in custody and the appropriateness of the provision in the EHCP in light of the detained person's progress or changed circumstances. Their EHCP will be formally reviewed upon release. An EHCP cannot be amended or ceased during their time in custody.

***\*A child becomes a 'young person' at the end of the academic year when they turn 16 years old.***

## Who should arrange/attend the Annual Review?

The educational setting must convene the EHCP review and along with the relevant setting staff, invite the following to attend the meeting:

- the child's parents/carers or young person;
- the local authority SEND Case Officer / Coordinator (if appropriate);
- any other professional working with the child/young person including health, social care, sensory inclusion service, short breaks provider etc;
- if the child/young person is approaching a transition to another setting a representative from the new setting should also be invited.

Parents/carers may also wish to invite somebody to provide them with support or guidance, such as IASS. Young people may have an independent advocate who they would wish to also be included in the review.

## The Mental Capacity Act

The SEND Code of Practice (CoP) states that a young person in a post 16 placement with an EHCP has the right to make decisions about their plan unless they do not have the mental capacity to do so as identified through an assessment.

SEND CoP 2015 8.19 *“The right of young people to make a decision is subject to their capacity to do so as set out in the Mental Capacity Act 2005. The underlying principle of the Act is to ensure that those who lack capacity are empowered to make as many decisions for themselves as possible and that any decision made or action taken on their behalf is done so in their best interests. Decisions about mental capacity are made on an individual basis, and may vary according to the nature of the decision. Someone who may lack capacity to make a decision in one area of their life may be able to do so in another.”*

The five key principles of the Mental Capacity Act are:

- 1) **Presumption of capacity** – Every individual has the right to make his or her own decisions and must be assumed to have capacity to do so unless it is proved otherwise.
- 2) **Individuals are supported to make their own decisions** – A person must be given all practicable help before anyone treats them as not being able to make their own decisions. This means you should make every effort to encourage and support people to make the decision for themselves. If lack of capacity is established, it is still important that you involve the person as far as possible in making decisions.
- 3) **Unwise decisions** – People have the right to make decisions that others might regard as unwise or eccentric. You cannot treat someone as lacking capacity for this reason.
- 4) **Best interests** – Anything done for or on behalf of a person who lacks mental capacity must be done in their best interests.
- 5) **Less restrictive option** – Someone making a decision or acting on behalf of a person who lacks capacity must consider whether it is possible to decide or act in a way that would interfere less with the person’s rights and freedoms of action, or whether there is a need to decide or act at all.

There is also further guidance on the Mental Capacity Act and how it applies to parents and to young people in relation to the Act in Annex 1, Mental Capacity, of the SEND Code of Practice.

### How much notice should be given?

Attendees must be given at least two weeks' notice, however we would recommend giving practitioners and parents/carers 6 weeks' notice to ensure their availability can be met and to provide sufficient time so that they can submit a written report / supporting information.

### Prior to the Annual Review Meeting:

The appropriate person appointed as chair of the Annual Review from the educational setting (usually the Senco or Headteacher) should:

- Write to all practitioners involved with the child/young person to invite them to attend the Annual Review and to seek their advice and information.
- Write to the parents/carers to invite them to attend and send them the parent's/carers views document to complete prior to the meeting.
- Arrange for the child's/young person's views to be collected.
- Collate any appropriate educational information and reports, including the latest EHCP, the person centred plan, national attainment levels etc. It is important to use this time to speak to all staff who have contact with the child/young person on a regular basis.
- Collate and circulate all advice and information gathered to all those invited at least two weeks before the meeting.

### The Annual Review for all pupils.

The person chairing the Annual Review should explain clearly the purpose of the meeting and introduce any ground rules that they feel are appropriate. The meeting should begin with a welcome and introductions where everyone can explain their relationship to the child or young person and their role/contribution to the meeting. It is the chair's responsibility to indicate any agencies involved that are not present.

The chair should ensure everybody has a copy of the child's/young person's most up to date EHCP and the Annual Review report plus any other reports/information which may be appropriate.

The meeting should:

- **be person-centred** and must involve the child or young person and their parent/carer, and must take into account their views, wishes and feelings especially when making decisions;
- **gather and assess information** which can be used by the educational setting to support the child or young person's progress across all areas of their life and their access to teaching, learning and other support;
- **review the specialist educational, health and social care provision** made for the child or young person to ensure it is being effective in ensuring good progress towards outcomes;

- **review short-term outcomes** in the Person Centred Plan, set by the educational setting for the coming year and where appropriate agree new short-term outcomes;
- **review long-term outcomes** in the EHCP and amend/set new ones as appropriate to enable continued improvement;
- **review transport arrangements** and identify if transport is required, if existing transport needs to be altered or ceased or if independent travel training is appropriate;
- **review of any existing Personal Budget** and arrangements for Direct Payments, including the right to request a personal budget;
- **consider whether the EHCP is still appropriate** in light of progress being made during the previous 12 months and whether changes are required to any part(s) of the plan or whether the plan can be discontinued as a result of outcomes being met.

### **Additional requirements for an Annual Review for pupils from Year 9 onwards**

All Annual Reviews from Year 9 must include a focus on preparing a child/young person for adulthood. Planning must be centred on the child/young person's aspirations and abilities. What they want to be able to do when they leave further education and how they can be supported. Children/young people should have the information they need to move onto the next stage of their lives which will happen at different periods for each young person.

Some young people will move to employment or higher education, or to on-going health/adult services including adult learning opportunities. In preparation, all young people should ideally be supported to start to understand about preparing for adulthood from Year 9.

Annual Review discussions, support and help should include:

- High quality, independent careers guidance from Year 9 until 18 years and to 25 years (as applicable) for young people with EHC plans;
- Higher education and/or employment, identifying appropriate post 16 pathways that will lead to these outcomes;
- Training options, work experience, work skills and help with understanding options including associated work linked welfare benefits;
- Decisions that young people want to make for themselves and planning their role in decision making as they become older. From the end of the academic year in which a young person turns 16 the right to make requests and decisions under the Children's & Families Act lies with the young person directly;
- Support to prepare for independent living, where they want to live and what support they may need. Where to find information about local housing options and benefits;
- Social care support should be explained;
- Maintaining good health, where to find information and understanding which health services and professionals will be supporting them in adulthood. Planning and preparing the effective transition from children's to adult health services;
- Participating in society, where to find out about transport, mobility, social and community activities including opportunities for engagement within local decision making. Developing and sustaining friendships;

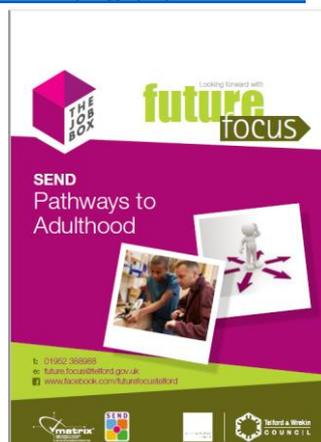
- Transition from Children’s to Adult services, should include effective planning between the services;
- Transitioning into Further Education (FE), preparing and helping young people understand about FE, study programmes, what support is available, exploring with young people their ambitions, abilities and who may be involved. Young people may express a preference for a particular FE institution and they should be helped to understand and be informed about all local options available. Partnership working with FE should take place to forward plan the right transition and support. This may include opportunities for young people to experience FE through open days and taster courses. FE representative should be invited to Annual Reviews, preferably from Year 10;
- Leaving FE, this will happen at different stages for young people, an exit plan and review will help support young people with their transition from FE and will assist effective planning with Higher Education/Adult Social Care/Health and other agencies involved. Young people should have information about where to go and how to find out about employment opportunities;
- Preparation for adulthood must be built into the EHC plan.

### Careers advice for children and young people

Schools and colleges must ensure that students are provided with independent careers guidance. Schools and colleges should raise the career aspirations of their students with special educational needs and disabilities and broaden their employment horizons. They should use taster opportunities, work experience, mentoring, role models and inspiring speakers to assist young people to make informed decisions.

FutureFocus is a specialist Careers Service run by Telford and Wrekin Council which provides impartial information, advice and guidance for young people in Telford aged 13 – 19 years (or up to 25 if they have an Education, Health and Care Plan). The FutureFocus SEND Pathways to Adulthood booklet can be found on the Local Offer.

<https://www.telfordsend.org.uk/homepage/8/transition>



Further detailed information on PfA can be found on the [Local Offer here](#)

## Following the Annual Review

The chair will prepare the Annual Review report which needs to be signed by themselves and the parent/young person. The Annual Review report and any additional documents should then be sent to the SEND Team at [sendandinclusion@telford.gov.uk](mailto:sendandinclusion@telford.gov.uk) or via encrypted email where required.

Word versions of the review documentation would be preferred although a PDF copy of the signatures page is recommended.

If you are not able to access our encrypted email service you may post the paperwork to: The SEND Team, Telford and Wrekin Council, 6B Darby House, Lawn Central, Telford, TF3 4JA.

## When do you need to send the paperwork?

The SEND Code of Practice states that the completed Annual Review report and any additional documents must be sent to the SEND Team **within 2 weeks of the meeting date**, this must not be exceeded.

## What happens next?

The SEND Team at the Local Authority (LA) will monitor the Annual Review report and any additional documents. Parents/young person/school will receive a letter confirming the LA's decision to either maintain, amend or cease the EHCP within 4 weeks of the meeting. The action will then be concluded within 12 weeks of the meeting. Please note the LA are only able to keep to these deadlines if the educational setting submits the paperwork within the two week deadline.

If you have any queries please contact the LA SEND Coordinator who is allocated to your school, or the SEND admin team on 01952 381045 or you can email [sendandinclusion@telford.gov.uk](mailto:sendandinclusion@telford.gov.uk)

## Section 2.

### Guidance for conducting a 'Live' Annual Review of an EHCP

Following a successful pilot project, Telford and Wrekin Local Authority is now requesting all schools and settings to conduct an annual review of an EHCP using the 'Live' review process. The aim is to reduce the amount of paperwork that needs to be completed, avoid unnecessary replication and use a smoother, electronic process. As a review approaches, settings will be provided with the most current version of the child's/young person's EHCP as an editable WORD document. All other Annual review documentation will be available for download from the LA's Local Offer. If accepting electronic copies of views from parents/carers, please bear in mind confidentiality/GDPR.

Some important information regarding 'Live' reviews:

Schools/Settings **must not delete any** content of the existing EHCP but can annotate the EHCP using the following conventions:

Old, inaccurate information or information that is considered and agreed to be no longer relevant should be ~~struck through~~.

*New information should be written into each section as appropriate in italicised font.*

The LA requests that schools/settings **do not use any other type of formatting** as part of the amendment process of the plan, this includes the use of highlighting and coloured fonts.

Schools/settings **must complete the shortened version of the Annual Review documentation which is to be signed by the school/setting and the parents**. The suggested amendments to the plan also need to be made and then **all documents must be submitted to the LA at the same time**. Please do not just send in the amended EHCP without the signed Annual review documentation.

Schools/settings can suggest amendments to the personal details section of the EHCP, section A (All about me), section B (educational needs), section F (educational provision) and to any educational long term outcomes in section E. **However**, any suggested amendments must be supported by relevant educational evidence such as that provided by an EP, LSAT, BSAT, other educational professional or appropriate school based data.

**All suggested amendments** to sections relating to **Health (C and G) or Social Care (D and H1/H2) or to Health and Social Care Outcomes must be supported by relevant advice by representatives of those agencies or reports from them**. Educational settings are not to make changes to Health and Social Care sections of the plan without supporting advice.

Suggested changes must be shared with the parent/child/young person.

When amending the existing EHCP it is important that all sections are reviewed, even if there are no changes to be made. This includes the personal details section of the plan to ensure that the correct address, contact numbers etc are included. The Annual review documents do not have a section in which to record any changes to personal details and therefore they must be amended directly on to the EHCP.

### Child/Young Person Details

Check/confirm that the child/YP details are correct. Inaccurate information should be ~~struck through~~. *New information should be written directly into each section as appropriate in italicised font.*

**Primary** Area of SEN: Check that the correct one is identified. If not ~~strike out~~ and add what the setting consider to be Primary Area of Need in *italics – please include your reasons for the suggested change*. *The LA will then review this suggested change and the reasons for it.*

### Is the Child/Young Person a Child in Care? Yes/No

If yes, confirm which Authority is the child/young person in care to and check details of Social Worker are still correct (if not, please ~~strike them through~~ and add the new details in *italics*).

### Parent/Carer Details

Check/confirm that all the contact details are correct. Inaccurate information should be ~~struck through~~. *New information should be written directly into each section as appropriate in italicised font.*

### Child/Young Person's Views & Aspirations

A paper version of this section is available (see Appendices 1 and 2) which should be completed by the child/young person **before** the meeting. The setting can add these comments (or images) into the WORD copy of the most recent EHCP prior to the meeting. If the YP attends the meeting and their views have changed, they can be updated 'live' if necessary.

From Year 9 onwards there **must** be a clear focus on the 4 Preparing for Adulthood (PfA) Outcomes.

Previous views, old or inaccurate information on the EHC Plan should be ~~struck through~~.

*New views and aspirations should be written directly into each section as appropriate in italicised font.*

### Parent/Carer Views & Aspirations

A paper version of this section is available (see Section 7 appendix 3). This should be sent out to the parent/carers at least two weeks before the review meeting. If the parent submits a hand written copy of

their views this can be inserted into the plan later. If they want to contribute their views at the meeting, they can be typed in 'live' *using italics*.

Parents can also submit their views electronically for inclusion in the EHCP. These should be *italicised*.

Old or inaccurate information should be ~~struck through~~. *New information should be written directly into each section as appropriate in italicised font.*

Pictures or other non-text based information that cannot be struck through but which require removal from the plan should be crossed through using the insert shapes option and selecting a line to be drawn through the information to be removed.



#### Attendance Data

The LA require Attendance Data for the current and previous academic year (*see relevant Annual Review template*) This is not included in the EHC plan.

#### Briefly review progress

This can be added into the report/notes of the meeting (*see relevant Annual Review template*).

**Changes to sections B, C and D** of an EHCP. These sections describe the child/young person's:

- Strengths and special educational needs (SEN);
- Health needs which relate to SEN;
- Social care needs that relate to SEN.

Suggested amendments to **any** of the needs as described in the relevant sections of the EHC Plan **must be considered on the basis of appropriate professional advice** (e.g. SENDCo, Educational Psychologist, Learning Support Advisory Teacher, Behaviour Support Teacher, Inclusion Mentor, Speech and Language Therapy Service, Bee-U, Occupational Therapy, Sensory Inclusion Service, Paediatrician/Consultant as appropriate, other health specialist (such as Diabetic Nurse), Social Worker or other Social Care representative as appropriate and so on). Reports from professionals used to suggest amendments to a plan are needed **must** be attached to this document.

Using a WORD copy of the most recent EHCP, information that is considered out of date or no longer relevant in any of these sections should be ~~struck through~~. *New information should be written directly into each section as appropriate in italicised font.*

Once the LA is in receipt of the amended EHCP they will consider any requests for amendments based upon the evidence/attached reports to support the amendments.

**Section E** of the plan is a summary table of the long-term outcomes.

On the basis of any changes you have identified to be made to **Sections B, C and D**, are any proposed changes to the current outcomes required?

From Year 9 onwards, the outcomes **must** include a PfA focus around the following:

- Employment/Education
- Community Inclusion
- Independent Living
- Health

The July 2020 version of the Telford and Wrekin EHCP template includes the Long Term outcomes and some suggested **steps to achieve** them. The steps are generally the short term outcomes from Educational Psychology reports or other professional advice or short term targets set by schools. If an existing EHCP is being amended that does not contain steps, please include a copy of the short term targets that have been identified by the school/setting so that these can be included in the plan.

Using a WORD copy of the most recent EHCP, outcomes that are considered not appropriate or have been met/achieved that are currently in the table on Section E should be ~~struck through~~. *New outcomes should be written directly into the table in section E in italicised font.*

**Sections F, G and H** of the plan list the provision(s) required to meet the long-term outcomes. A provision map detailing how the provision outlined in the plan is being implemented should be available at the review meeting and sent in with the paperwork.

On the basis of any changes you have identified to be made to the needs and outcomes, are any changes to the current provision required?

Using a WORD copy of the most recent EHCP, information that is considered out of date or no longer relevant and considered to be no longer required in any of these sections should be ~~struck through~~. *New information should be written directly into each section as appropriate in italicised font.*

Once the LA is in receipt of the amended EHCP they will consider any requests for amendments.

**Summary of key action points from the Annual Review meeting (Record of discussion)**

A record of the meeting should be completed, including any issues and actions that arise.

A WORD template for the Annual review (see Sections 3 and 4) will be provided with the WORD copy of the EHCP and it should be completed as a record of the meeting and sent securely into the LA along with the annotated EHC Plan within two weeks of the review meeting.

**Please adhere to Local Authority and your own setting's policies and guidelines with respect to confidentiality and GDPR.**

***Personal Budget***

Identify if the child/young person, parent or carer wants more information on a Personal Budget. If so, provide them with this link and indicate **Yes** on the EHC Plan.

[http://www.telfordsend.org.uk/localofferservices/homepage/10/personal\\_budgets](http://www.telfordsend.org.uk/localofferservices/homepage/10/personal_budgets)

If a personal budget is already in place please ensure this section of the plan is updated from the current Care Plan or by using the completed Social Care Advice Template (Social Care to provide). Information that is considered out of date or no longer relevant and considered to be no longer required should be ~~struck through~~. *New information should be written directly into this section as appropriate in italicised font.*

**Transport:** Only complete this section if the pupil has transport specified in their EHC Plan

Review transport arrangements and identify if transport is still required, if existing transport needs to be altered or ceased or if independent travel training is appropriate. Record details in the Summary of Key Action Points (Record of discussion) section of the review document.

**Recommendations (delete as appropriate)**

There are three possible recommendations to be made at the end of a review. They are:

- Maintain the EHCP
- Amend the EHCP
- Cease the EHCP

The LA needs a clear indication of what that recommendation is. **Only one** of these recommendations should be selected.

**Agreement of content of review:**

It is important that **signatures** are obtained from the following wherever possible to indicate agreement of the content:

Head Teacher (or equivalent) / SENCo (or equivalent) / Parent / Child/Young Person (see additional documentation).

At the end of the 'Live' review there will be a new suggested draft amended EHC plan which will be sent to the LA for consideration of the suggested amendments.

The Annual Review documentation will also need to be completed and sent to the LA along with the amended EHC plan.

Please send all of these documents to the LA in WORD format.

The LA will review the completed Annual Review Documents and the suggested amendments. A Draft Version of the amended plan will then be sent out to the parent / young person to be reviewed. Once agreed the finalised signed EHC plan will be sent out to the parent/young person as a Pdf. School/settings will be sent the signed Pdf as well as an unsigned WORD version which will then be used at future reviews.

## Section 3.

### Annual Review of an EHC Plan ('Live' version) up to and including Year 8

**Date of Annual Review Meeting:**

**Name of Setting:**

*This is an editable WORD document and should, wherever possible, be completed electronically. Rows can be added or deleted as necessary. The setting should fill in as much as possible and send out to the parents/carers two weeks prior to the Annual Review meeting. The EHC Plan must be reviewed annually, however there is no expectation that it will require amending annually. Amendments are required when there are significant changes to the needs, outcomes or provision. (EHCP's may not need to be amended on a very frequent basis section 9.153 CofP)*

Name of Child/Young Person:		Date of Birth:		
Please check all personal information (address/contact details etc) and amend the plan where required.				
<b>Attendance Data:</b> Please give % attendance data				
Attendance (current year) =		Attendance (Previous year) =		
<b>Record of people invited to and who attended the meeting:</b>				
Name	Role and/or relationship to family	Invited Yes/No	Attended Yes/No	Report requested/received Yes/No
	Lead Professional			
	Child/Young Person			
	Parent/Carer			
<b>Current Attainment Data</b>				
Please give details of current attainment data from school based assessments or other professional reports (EP/LSAT etc).				
<b>Child's/Young Person's and Parent/Carer views and aspirations:</b>				
Complete the relevant templates from Section 7 to reflect current views.				
<b>Briefly review the progress towards current outcomes:</b>				
Are the outcomes as identified in the EHCP remaining the same? Yes/No				
Evidence of short term outcomes must be attached to the AR Paperwork. (E.g. The settings own individual short term plan/provision map etc to meet outcomes).				

Summary of key action points from annual review meeting (Record of discussion):		Action (by whom/when)
<b>Request for a change of Banding (Mainstream settings only):</b>		
From...                      To...		
Please provide details (e.g. a costed provision map) if the request is for an increase in Banding.		
<b>Personal Budget:</b>		
Would the young person, parent or carer want more information on Personal Budgets?		
Yes / No / Want more information before deciding.		
<a href="http://www.telfordsend.org.uk/localofferservices/homepage/10/personal_budgets">http://www.telfordsend.org.uk/localofferservices/homepage/10/personal_budgets</a>		
If a personal budget is already in place please ensure this section of the plan is updated from the current Care Plan (Social Care to provide).		
<b>Transport:</b> Only complete this section if the pupil has transport.		
Please identify current travel arrangements:		
School Bus <input type="checkbox"/> Taxi <input type="checkbox"/> Bus Pass <input type="checkbox"/> Other (specify) <input type="checkbox"/>		
<i>What special travel arrangements are in place to meet the particular needs of the child/young person?</i>		
<i>Could the young person be considered for independent travel training?</i>		
<i>Does this include a passenger assistant?</i>		
<i>Any other comments about the child/young person's travel arrangements?</i>		
<b>Recommendations: (*delete as appropriate)</b>		
Maintain EHCP	Yes/No*	If Yes; All agree that long-term/short-term outcomes remain appropriate and that the level of support is sufficient to meet needs.
Amend EHCP	Yes/No*	If Yes, which sections are you changing? (Circle/Highlight) a, b, c, d, e, f, g, h, i, j, k, l  If an increase / decrease in Banding is requested please ensure the Banding section above has been completed or for Special School's only complete Template 1.
Cease EHCP	Yes/No*	If Yes; please give details and signpost to evidence to support the cease request (ie: child/young person's needs can be fully met at SEN Support)

**Agreement of content of review:**

	Signature	Printed	Date
Head Teacher (or equivalent)			
SENCo (or equivalent)			
Parent/Carer			
Child/Young Person			

**Agreement of Parent / Carer to share documents related to the review:**

Child/Young Person's name: \_\_\_\_\_ Date: \_\_\_\_\_

I/we agree with papers being shared with educational settings, schools and professionals as and when appropriate.

Privacy Notice under the Data Protection Act (General Data Protection Regulations from 26<sup>th</sup> May 2018)

Telford & Wrekin Council are collecting Personal Identifiable Information to enable the best possible advice and support to be provided and to meet the statutory requirements under the Children and Families Act 2014. We need to collect this information in order to consider the outcomes and recommendations following an Education Health Care Plan review. This information is being processed under DPA – Schedule 2 (2a) (GDPR 2018 -Article 6 (1) b).

Telford & Wrekin Council will not share any Personal Identifiable Information collected with external organisations unless required to do so by law.

However, this information will be shared within Telford & Wrekin Council and partners agencies (Department of Education, NHS, Schools/settings, and Early Years providers).

For further details on the council's privacy arrangements please view the privacy page on the council's website page <http://www.telford.gov.uk/terms>

Signed: ..... Date: ..... (Parent / Carer)

Signed: ..... Date: ..... (Parent / Carer)

Signed: ..... Date: ..... (Child/Young Person)

## Section 4.

### Annual Review of an EHC Plan ('Live' version) Year 9+

**Date of Annual Review Meeting:**

**Setting:**

*This is an editable WORD document and should, wherever possible, be completed electronically. Rows can be added or deleted as necessary. The setting should fill in as much as possible and send out to the parents/carers two weeks prior to the Annual Review meeting. The EHC Plan must be reviewed annually, however there is no expectation that it will require amending annually. Amendments are required when there are significant changes to the needs, outcomes or provision. (EHCP's may not need to be amended on a very frequent basis section 9.153 CofP)*

Name of Child/Young Person:		Date of Birth:		
Please check all personal information (address/contact details etc) and amend the plan where required.				
<b>Attendance Data:</b> Please give % attendance data				
Attendance (current year) =		Attendance (Previous year) =		
<b>Record of people invited to and who attended the meeting:</b>				
Name	Role and/or relationship to family	Invited Yes/No	Attended Yes/No	Report requested/received Yes/No
	Lead Professional			
	Child/Young Person			
	Parent/Carer			
<b>Current Attainment Data:</b>				
Please give details of current attainment data from school based assessments or other professional reports (EP/LSAT etc).				
<b>Child's/Young Person's and Parent/Carer views and aspirations:</b>				
Complete the relevant templates from Section 7 to reflect current views.				
<b>Briefly review the progress towards current outcomes:</b>				
Are the outcomes as identified in the EHCP remaining the same? Yes/No				
Evidence of short term outcomes must be attached to the AR Paperwork. (E.g. The settings own individual short term plan/provision map etc to meet outcomes).				
<b>Year 9 / Year 10 / Year 11 Reviews <u>MUST</u> include Evidence of Planning for Transition to Adulthood:</b>				
From year 9 onwards, children and young people with an EHC Plan access Careers Information, Advice and Guidance (IAG) from an appropriate professional. A summary of this should be included, in italics, in the information section in Section A of their EHC Plan.				

Summary of key action points from annual review meeting (Record of discussion):		Action (by whom/when)
<b>Request for a change of Banding (Mainstream settings only):</b>		
From...                      To...		
Please provide details (e.g. a costed provision map) if the request is for an increase in Banding.		
Would the young person, parent or carer want more information on Personal Budgets?		
Yes / No / Want more information before deciding.		
<a href="http://www.telfordsend.org.uk/localofferservices/homepage/10/personal_budgets">http://www.telfordsend.org.uk/localofferservices/homepage/10/personal_budgets</a>		
If a personal budget is already in place please ensure this section of the plan is updated from the current Care Plan (Social Care to provide).		
<b>Transport:</b> Only complete this section if the pupil has <u>transport specified in their EHC Plan</u>		
Please identify current travel arrangements:		
School Bus <input type="checkbox"/> Taxi <input type="checkbox"/> Bus Pass <input type="checkbox"/> Other (specify) <input type="checkbox"/>		
<i>What special travel arrangements are in place to meet the particular needs of the child/young person?</i>		
<i>Could the young person be considered for independent travel training?</i>		
<i>Does this include a passenger assistant?</i>		
<i>Any other comments about the child/young person's travel arrangements?</i>		
<b>Recommendations: (*delete as appropriate)</b>		
Maintain EHCP	Yes/No*	If Yes; All agree that long-term/short-term outcomes remain appropriate and that the level of support is sufficient to meet needs.
Amend EHCP	Yes/No*	If Yes, which sections are you changing? (Circle/Highlight) a, b, c, d, e, f, g, h, i, j, k, l  If an increase / decrease in Banding is requested please ensure the Banding section above has been completed or for Special School's only complete Template 1.
Cease EHCP	Yes/No*	If Yes; please give details and signpost to evidence to support the cease request (ie:

		child/young person's needs can be fully met at SEN Support)	
<b>Agreement of content of review:</b>	<b>Signature</b>	<b>Printed</b>	<b>Date</b>
Head Teacher (or equivalent)			
SENCo (or equivalent)			
Parent/Carer			
Child/Young Person			
<b>Agreement of Parent / Carer to share documents related to the review:</b>			
Child/Young Person's name:		Date:	
<input type="checkbox"/> I/we agree with papers being shared with educational settings, schools and professionals as and when appropriate.			
<p><u>Privacy Notice under the Data Protection Act (General Data Protection Regulations from 26<sup>th</sup> May 2018)</u></p> <p>Telford &amp; Wrekin Council are collecting Personal Identifiable Information to enable the best possible advice and support to be provided and to meet the statutory requirements under the Children and Families Act 2014. We need to collect this information in order to consider the outcomes and recommendations following an Education Health Care Plan review. This information is being processed under DPA – Schedule 2 (2a) (GDPR 2018 -Article 6 (1) b).</p> <p>Telford &amp; Wrekin Council will not share any Personal Identifiable Information collected with external organisations unless required to do so by law.</p> <p>However, this information will be shared within Telford &amp; Wrekin Council and partners agencies (Department of Education, NHS, Schools/settings, and Early Years providers).</p> <p>For further details on the council's privacy arrangements please view the privacy page on the council's website page <a href="http://www.telford.gov.uk/terms">http://www.telford.gov.uk/terms</a></p>			
Signed: .....		Date: ..... (Parent / Carer)	
Signed: .....		Date: ..... (Parent / Carer)	
Signed: .....		Date: ..... (Child/Young Person)	

# Section 5.

## Appendices

### Appendix 1.

#### Child's/Young Person's views up to and including Year 8.

<b>Child's/Young Person's Views and Aspirations.</b> To be completed prior to the meeting wherever possible. It can be amended at the meeting. If accepting electronic copies, please bear in mind confidentiality / GDPR.	
What I like and enjoy doing.	
What I think I'm good at.	
What I don't like or don't like doing.	
The best ways to communicate with me are....	
Things that help me in the school/setting are...	
Any other comments.	

## Appendix 2

### Child's/Young Person's views Year 9+

<b>Child/Young Person's Views and Aspirations including for Adulthood.</b> To be completed prior to the meeting wherever possible. It can be amended at the meeting. If accepting electronic copies, please bear in mind confidentiality / GDPR.	
What I like and enjoy doing.	
What I think I'm good at.	
What I don't like or don't like doing.	
The best way to communicate with me is....	
Things that help me in the school/setting are...	
How I feel about the future / What job I think I would be good at.	
What training and /or further education I think I might need to help me get a job.	
What I and others need to do to help me get a job in the future.	
Where I would like to live in the future.	

### Appendix 3

#### Parent/Carer views and aspirations

Parent/Carer Views and Aspirations for Adulthood: (to be completed prior to the meeting wherever possible. It can be amended at the meeting).	
What are your views about the progress your child is making / what's working well / what's not working well?	
What are your aspirations for your child for the short-term?	
What are your aspirations for your child for the long-term? (e.g. Future education/ college/apprenticeship/ work).	
Use this space to tell us anything else you would like us to know:	

**Appendix 4**

**Additional Banding request Template 2 (Special Schools only)**

**Template 2**

**Request for a change in banding at the point of an annual review**

<b>Name of Young Person:</b>
<b>Current School:</b>
<b>Request date:</b> <b>Current banding level:</b>
<b>New Banding request:</b>
<b>Reason for adjustment:</b>
<b>If an increase is being requested what has been tried to date:</b>
<b>What provision is currently in place:</b>
<b>Progress log:</b>
<b>Evidence of interventions:</b>
<b>Overview from the SEND Officer:</b>
<b>Recommendation from the SEND Team Lead:</b>

**Approval:**

<b>SEND Team Lead Signature:</b>
<b>Name:</b>
<b>Date:</b>

**Appendix 5**

**Additional Banding request Template 3 (Special Schools only)**

**Template 3**

**Request for Exceptional Special Needs Form (ESN 1 or 2)**

<b>Name of Young Person:</b>
<b>Current School:</b>
<b>Request date:</b>
<b>ESN being requested (1 or 2):</b>
<b>Current Banding: (only children banded at a Level 4 can ESN be requested)</b>
<b>Brief outline of issue / concern:</b>
<b>What has been tried to date:</b>
<b>What provision is currently in place:</b>
<b>Behaviour / incident log:</b>
<b>Evidence of interventions that limit school resources:</b>
<b>Overview from the SEND Officer:</b>
<b>Recommendation from the SEND Team Lead:</b>
<b>Feedback from the SDM:</b>

**Approvals:**

<b>SDM Signature:</b>	<b>Name:</b>	<b>Date:</b>
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## Appendix 6

### Social Care advice for an Annual Review template.



## Social Care Advice Update.

**Please provide an update to the child's/young person's social care needs.**

Name of child/young person.....

DoB.....

**Needs:** Have the child's/young person's social care needs changed since the EHCNA/Previous Annual Review?

Yes/No

If they have changed, what are the child's/young person's social care needs now?

(Please detail current needs or state no amendments are required)

**Outcomes:** Does the child/young person have identified social care outcomes?

Yes/No.

If they have changed, what are the child's/young person's social care outcomes now?

(Please detail current outcomes or state no amendments are required)

**Provision:** (What provision will social care be offering to the child/young person to support them to achieve the identified social care outcomes?)

Who will deliver the identified provision?

(Please identify which social care team/s are involved with providing support)

## Personal Budgets

### Personal Budgets

Does the child/young person have a personal budget?

Yes/No

(If yes, please complete the following information)

Child/Young person has a personal budget of £..... per annum which will be reviewed in **Date (if known) at the next Support Plan review (If date not known).**

(If no) Have the family been signposted to the guidance on Personal Budgets which can be found on the Local Offer <a href="http://www.telfordsend.org.uk">www.telfordsend.org.uk</a>	Yes/No
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Name of person completing this form: .....

Job Title:.....

Date:.....