



Telford & Wrekin
Co-operative Council

Protect, care and invest
to create a better borough



Annual Review Workshop SAM Portal update

June 2026

Statutory SEND Team

How well do you feel you know the Annual Review Process

Mentimeter CODE: 1173 8092

<https://www.menti.com/alhvnrixawv1>



Code of Practice 9.166 -9.185



The Code of practice states that every EHCP must be reviewed annually.

- The setting is required to convene and hold the Annual Review meeting. *‘Reviews are generally most effective when led by the educational institution’ CoP 9.175*
- *‘EHC plans should be used to actively monitor children and young people’s progress towards their outcomes and longer term aspirations’*

Reviews should also:

- **gather and assess information** so that it can be used by early years settings, schools or colleges to support the child or young person’s **progress and their access to teaching and learning**
- review the special educational provision made for the child or young person to ensure it is **being effective in ensuring access to teaching and learning and good progress**
- **review the health and social care provision** made for the child or young person and its effectiveness in ensuring good progress towards outcomes
- **consider the continuing appropriateness** of the EHC plan in the light of the CYP’s progress during the previous year or changed circumstances and whether changes are required including any changes to outcomes, enhanced provision, change of educational establishment or whether the EHC plan should be discontinued
- **set new interim targets** for the coming year and where appropriate, agree new outcomes
- **review any interim targets** set by the early years provider, school or college or other education provider

Annual Review Listings

- Listings of all Annual Reviews for your school or setting have been sent out.
- All the reviews have been RAG rated to assist with your planning:

Red – Overdue

Amber – Due Summer term (end of August)

Green – Due Autumn Term or beyond (From September onwards)

Blue – booked in or in process

We would like to politely request that any Reviews that are currently Overdue are booked in and completed.

It's where I can tell people what I want and need

It's when the plan is updated

It's when we have a chance to check progress

It's a statutory duty

It's where outcomes and provision to be considered

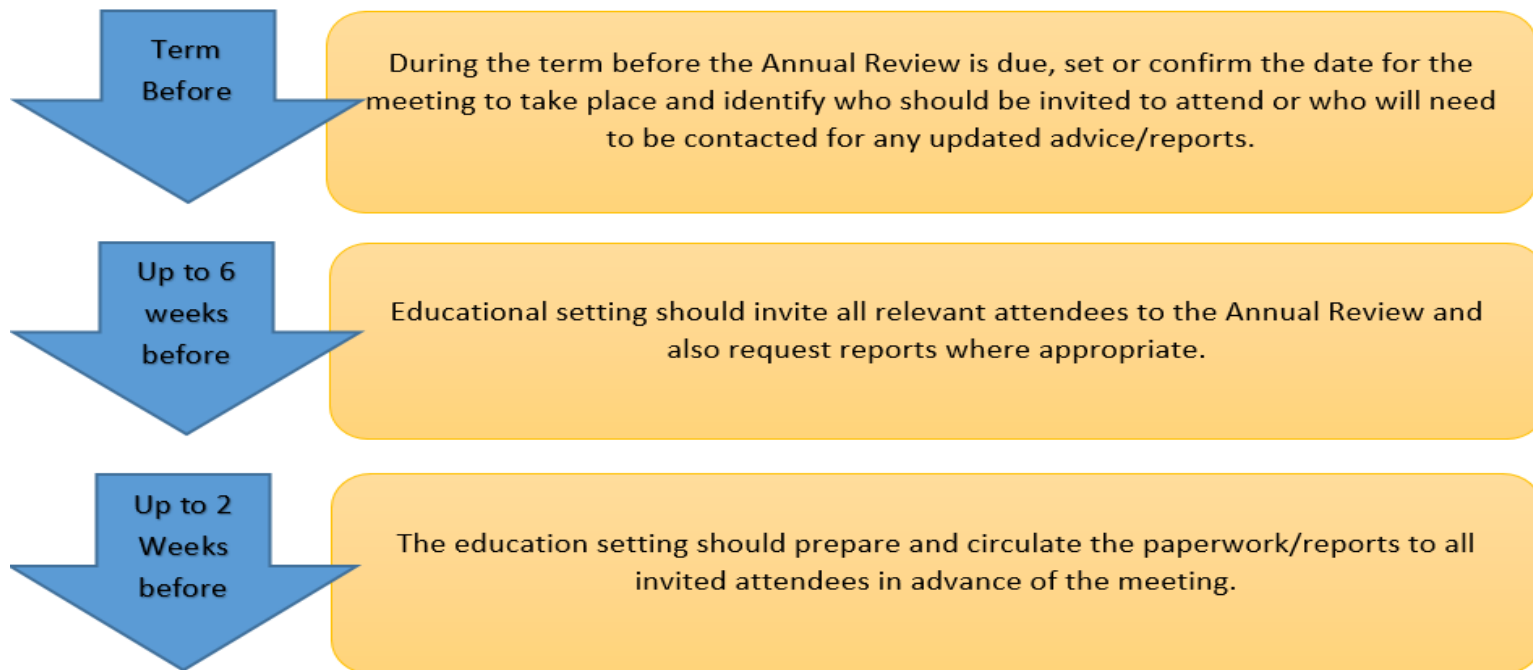
To get input from all involved

Annual Reviews –
What is the purpose?

The ideal Annual Review

What must be done?

EHCP Annual Review Process



*The LA have 4 weeks to make a decision and then a further 8 weeks from the meeting date to complete the process so it is vital that schools send ALL paperwork to the LA **within two weeks**.

Please do not say 'Report to follow'; the LA can't accurately process an incomplete review.

Live Annual Reviews

Suggested amendments are made directly onto the EHC Plan using the following coding system:



Strikethrough – suggested text to be deleted

Italics – suggested text to be added

Cross out – Cross out any non text based information to be deleted

Insertion of new non text based information is acceptable
e.g. you can insert the amended One Page Profile.

Plan ahead – if you don't have a Word version already, please contact your locality Co-ordinator, Officer or Admin to request one.

Summary of Special Educational Needs
Communication and Interaction
XYZ's speech can be difficult to understand and is not intelligible for people unfamiliar to her, affecting her ability to make her needs known and communicate effectively. <i>The Speech and Language report dated 4th May 2020 identifies that her Receptive Language is 3.0 – 3.6 years and Expressive language is 3.6 - 3.11 years. Her Grammar score is 3.6 years. This is at the correct developmental level for her.</i>
XYZ:
<ul style="list-style-type: none">• Communicates predominantly by signing (Makaton); <i>XYZ communicates mainly through speech;</i>• Uses single <i>two and three</i> words to communicate and make her needs known;• Communicates non-verbally through gestures, pointing and facial expressions;• Is not yet able to follow instructions with more than 1 key word;• Has limited vocabulary;• Pays poor attention to adult speech;• <i>Understands visual prompts and likes to use the Now and Next board.</i>

Live Annual Reviews

Check, before the meeting, that you have the most up to date **Microsoft WORD** copy of the plan.

Email: SENDandinclusion@telford.gov.uk .

Annual Review paperwork templates are available on the SEND Local Offer.

Annual Review timescale is 12 weeks in total from the date of the Annual Review meeting taking place.

A full Telford and Wrekin guidance pack is available on the SEND Local Offer.



SEND Local Offer – Annual Reviews

All Annual Reviews in Telford & Wrekin should be ‘Live Annual Reviews’ and completed on the up to date paperwork, including an annotated EHC Plan.

Children & Young People

The child or young persons views can be provided in an imaginative or creative way.

It should be written in their voice.

Include short and long term aspirations.

For Year 9 upwards it should include aspirations about career paths and preparing for adulthood.

All about me...


My name is Billy.

I am always happy and smiling.

I enjoy playing outside, I love the beach and the park best.

I enjoy playing with wood and stones, sometimes I throw them.

I don't like loud noises, they scare me.




What is important to me...

I love playing with my mum and dad.

I love playing with my brother, Sam

I like to do things on my own, sometimes I may ask for some help.

I love to explore and find new places to play.



How I like to be supported...

I like to see pictures when you are talking to me so I can understand better.

I use my hands and sounds to talk.

I like you to be patient when I am trying to tell you something.

I don't like fluffy things, like teddy bears.


I don't like some materials and clothes.

I like to take off my shoes and socks.

I have support from the Visual Impairment Team.

I wear nappies.

I need help when I am eating.



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.	

Children, Young People & Families



[Tip for Annual Review of EHCP](#) now be found on the Local Offer:

- The Annual Review process explained
- How children, young people and families can share their views
- Who is involved in the process
- Information about professionals who may attend
- Live Annual Reviews – an explanation
- When an EHC plan will be amended
- Preparing for Adulthood
- Request for Feedback

[Webinars: one for young people and one for parents](#)

Telford & Wrekin Guide to the Annual Review Process for an EHCP

Annual Reviews - Top Tips for Parents, Carers & Families

The **SEND Code of Practice** states that every Education Health and Care plan (EHCP) must be reviewed annually. In most cases the review will be arranged by the school or setting. An exception to this may be if your child or young person is educated at home (Electively Home Educated), in this case the review will be arranged by the local authority.

Early Annual Reviews may be scheduled for various reasons, these can be requested by parents, carers, young person, school or setting. If as a parent or carer you feel that an early Annual Reviews is needed, please speak to your child or young persons education setting.

A few of the reasons that an early Annual Review may be held are:

1. Updated advice has been received that makes a significant difference to provision.
2. There is a request to increase high needs funding.

A change of placement is being requested.

Annual Review Process

2 Weeks Before the Meeting:

CHECK IN

**Any
questions?**

**Any
comments**

**Any
queries?**

Annual Review Templates

[Template:
Early Years – Year 9](#)

[Template:
Year 9 +](#)

Telford & Wrekin Guide to the Annual Review Process for an EHCP

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).



Download the Annual Review Guidance

Annual Review Templates for Educational Settings

[Annual Review template for live reviews up to and including Year 8](#)

[Annual Review template for live reviews Year 9+](#)

[Annual Review template \(non-live paper based\) up to and including Year 8](#)

[Annual Review template \(non-live paper based\) Year 9+](#)



How are the templates different?

Year 9+ has an additional short section to record any Preparing for Adulthood (PfA) information, such as careers advice from Future Focus etc.

★ Don't forget to request the Parent Carer signature on the Annual Review Paperwork. If we don't have a Parent's signature the LA is not able to process the Annual Review. ★

When to amend an EHC plan

'EHC plans are not expected to be amended on a very frequent basis' CoP 9.193

- When there is a significant change to the child's details, special educational needs, outcomes or provision.
- Changes need to be evidenced by reports.
(e.g.. Class Teacher, Internal Assessments, EP, LSAT, BSAT, Health, Social Care)
- At key Transition points:
 - Reception
 - Year 2
 - Year 5
 - Year 10



Top Tip: We recommend that you make changes during Year 5 and Year 10. Don't wait until Year 6 and Year 11 for key transition points.



Top Tip: Don't forget in Year 11 Review that you will need a Post 16 Advisor (Future Focus/Careers Advisor) for Transition Meetings



Preparing for Adulthood

Year 9 and onwards there will be a clear focus on Preparing for Adulthood.

What to think about...

Education & Employment

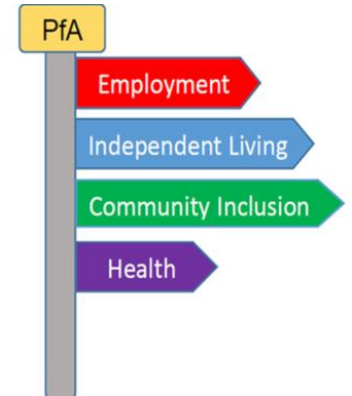
- post 16 placement
- vocational aspirations
- progression to a supported internship, apprenticeship, traineeship and employment

Transition

- transition to post 16 education placement - how this might look
- the type of support that might be needed post 16 – mentor/key person, meet and greet, quiet space, time out.
- Transition to Adult Social Care
- Transition to Adult Health Services

Independence

- travel training
- personal care
- organisation
- money



Health – Information from the DCO

We use the term health broadly – we are thinking about SLT, OT, Physio, Paediatricians, Psychologists, Psychiatrists, MH Nurses, Learning Disability Nurses, Health Visitors, School Nurses, Wheelchair Services, Orthotics, Specialist Doctors, GPs and many more.....!

When to tell health colleagues about an Annual Review

ASAP, at least 6 week's notice - health will likely need to complete a review assessment, write it up and discuss with CYP / parent / carer before the AR meeting

Who from health to ask to be a part of an Annual Review

- Any professional who contributed to the current EHCP, particularly if they set outcomes or have provision written into the EHCP
- Any profession the CYP is currently receiving support from (related to SEND) – this view point / provision may need to be added into the EHCP

Where to email requests for involvement in Annual Reviews to:

For: CYP Therapies (OT, Physio and SLT)

Shropcom.childtherapydocumentexchange@nhs.net

Subject line: 'Request for involvement at Annual Review'

Social Care – information from the DSCO

Who do we mean by Social Care?

This could be a Social Worker allocated to the family, Early Help Practitioner, a Family Solutions Worker, Case Worker (CWD)...

How to request a contribution to an Annual Review from Social Care?

Plan ahead, if the child or young person has an allocated worker they need to be informed at least 6 weeks before so that reports can be updated.

A Social Care advice form is available for schools to use.

How to use advice and reports in the Annual Review?

Any advice or reports need to be included in the Annual Review meeting, please don't use 'report pending' or 'see report'.

CHECK IN

**Any
questions?**

**Any
comments**

**Any
queries?**

Annual Review Checklist



Check EHC Plan is the most up to date plan and is a Microsoft Word version	✓
Ensure Parent, Carer, Child or Young Person details are correct (pay particular attention to children in care details).	✓
Pay particular attention to the parent email address now that we are working electronically as this helps to avoid a data breach.	✓
Include Progress Data so that it's clear where the child's levels are currently (including strikeouts of previous data).	✓
Section B - is a picture of the child's presenting needs. Don't forget to add positives about what the child is good at and not just the difficulties they have.	✓
Section F- be aware of what you are promising in section F! Is it something that the child requires to meet the needs set out in section B and evidenced by data and other professionals.	✓
Section E – if you amend outcomes ensure that the provision is appropriate to support that outcome	✓
Health and Social Care - it is a requirement that you obtain up to date advice from Health and Social care. Is the Medical Questionnaire completed	

Sam Portal

Over the past year, the Statutory SEND Team has been working with Synergy to develop a system that better aligns with our wider education partners.

What does this mean for school SENCOs?

From **September 2026**, schools will be able to submit **EHCNA requests and Annual review documents** through the **SAM Portal**.

This brings us in line with other education services and provides a more consistent and secure way for schools to share information.

We will provide a transition period over the autumn term across the service to explore how well this system works before updating our processes for statutory age settings.

Sendandinclusion@telford.gov.uk will still be available during this transition.

Sam Portal

What you need to do

The process itself remains simple:

- Complete the online form with pupil details (name, date of birth) and referrer information
- Attach the relevant EHCNA request or Annual Review documents
- Submit via the portal

Once submitted, this will be received directly by the SEND Team.

Importantly, there is no change to what you need to submit—only how you send it.

Sam Portal

Access to the SAM Portal

If colleagues in your school require access to the SAM Portal, please contact:

Educationssystemsupport@telford.gov.uk an account can then be set up for you.

More detail, links and documents can be found in the SENCo Newsletter.

Annual Review – After



School Report – Attainment, attendance, IEP's, Provision Map, minutes	✓
Parent Views – Pupil Views	✓
External Reports – Health, Social Care, EP's, Advisory support	✓
Annotated EHCP	✓
Send <u>complete</u> paperwork to SEND team within 2 weeks of the meeting	✓
The LA must make a decision to either, maintain, amend or cease within 4 weeks of the meeting date	✓
The LA decision will be shared with parents, school, health and social care (if applicable)	✓
If decision is to amend. The draft plan will be issued within 4 weeks. Parents will then be giving 15 days to make representations and the process will be completed 8 weeks after the decision was made	

Telford and Wrekin SENDIASS

Information, Advice and Support Service (IASS) aims to increase the confidence of parents/carers of children and young people with Special Educational Needs and Disability 0 – 25 years , by offering confidential and impartial information, advice and support on a wide range of SEND processes . To enable them to be more fully informed and increase their confidence to participate in their child's education.

We can offer information and advice on:

- Special Educational Needs procedures in school
- Assessment process for Education, Health & Care Plan
- Exclusions information
- Disability Discrimination
- Local Offer and Personal Budgets
- Transition and Annual Reviews
- Negotiation, mediation, tribunals and dispute resolution.

The service is free, confidential, impartial and accessible.

Contact 01952 457176 or email info@iass.org.uk for further information

website: www.telfordsendiass.org.uk

Signposting - Support

PODS Family Groups

Regular groups are for family members – including children and siblings – and provide local information and access to our Face2Face Scheme.



PODS Befriending Scheme

Peer led emotional and practical support from our PODS Befriending Scheme to support you and reduce isolation and increase your Wellbeing.

Challenges at Home Sessions

Support sessions for families, with a child with Autism with or without a diagnosis. Open to 0-18 years from mainstream and special schools. For families to discuss home/life concerns and seek information and advice from Educational Psychologist team around emotional, behaviour, social, anxieties, routines, etc.

01952 458047
0777 534 2092

Facebook:
PODS Telford
www.podstelford.org



FINAL CHECK IN

**Any
questions?**

**Any
comments**

**Any
queries?**

Your Views Matter...

We would like to increase the feedback we receive from children, young people and their families following their Annual Review and from yourselves

You will be sent a feedback form. Please complete and return these.

What will the feedback be used for?

- Demonstrate how the local area listens to the voice of the child, young person and their family.
 - Support developments to services
 - Improve our workshops
 - And much more...
-
- Localoffer@telford.gov.uk

Evaluation & Close

Thank you for attending.

Please complete the Feedback Form.