

MY GUIDE TO...

THE ANNUAL REVIEW OF AN EDUCATION, HEALTH AND CARE PLAN

Information for parents and carers

Once an EHC Plan has been issued, it must be reviewed regularly. For children under 5 years old this will happen every 6 months and for children aged over 5 years old the review will be held annually. The local authority must ensure that every EHC Plan is reviewed within these timescales and work closely with schools and other educational settings to make sure this happens.

An annual review of the EHCP is **not just about having a meeting**. The review is the whole process from the education setting gathering advice in advance of the meeting, up to the Local Authority processing the paperwork after the meeting to confirm whether changes to the EHCP will take place. Different people are more essential to different stages of the process, and not every person will necessarily be present for the whole review process.

Q1. Who carries out the annual review of an EHC Plan?

Where a child/young person attends a school or other educational setting, staff at that setting will typically arrange and hold the annual review meeting, sending the paperwork out beforehand and then submitting paperwork after the meeting. Where a child/young person is not on roll at a setting, the Local Authority will arrange for the annual review to take place. If you aren't sure when your child's annual review is due to be held, please contact the Special Educational Needs Co-ordinator (SENCo) at your child's educational setting. As such, it is overall the LA's responsibility to make sure the reviews happen, and the educational settings' and professionals' duty to cooperate with this by completing their various roles.

Q2. Who should be invited to contribute to an annual review of an EHC Plan?

It is good practice to plan annual reviews well in advance to ensure that all key people involved in the child/young person's plan can contribute advice for the review and, where possible, can attend the meeting. The list below provides an example of those who **must** be invited and those who **should** also be invited by the educational setting to participate in the annual review process.

The following people **must** be invited to participate in the review, either in writing or at the meeting:

- The child or young person
- The child parents or carers (parents or carers of those over 18 can be invited with consent of the young person, or without consent if they don't have capacity to give it)
- A school representative (e.g. one or more of the following - a class teacher, learning support assistant, SENCo)
- A local authority SEND case officer

The following people should also be invited to participate in the review **if they are involved with the child or young person;**

- Health professionals (e.g. nurses, speech therapists, occupational therapist etc.)
- A local authority social care representative
- Other individuals involved in the child/young person's plan e.g. youth offending team workers, early intervention key workers, outreach teachers etc.

If you feel that a particular professional should be invited to contribute to your child's review, please contact whoever is coordinating the meeting invites. Those invited to the annual review should be given as much notice of the meeting as possible. Young people may choose to have an advocate or other representative

present at the meeting and you may also bring along a friend, adviser, relative or an independent parental supporter if you wish.

It may not be necessary or possible for all of the people involved with your child/young person's to attend the review meeting itself. However, those professionals currently delivering any provision in the EHCP **must** provide advice for the review process, sending this to the person co-ordinating the meeting at least two weeks before the meeting date (ideally at least four weeks beforehand). This will then be distributed to those invited to the meeting two weeks before the meeting date. If you do not receive the paperwork prior to the meeting, you should contact the person at the educational setting who is coordinating the review.

It is important to note that professionals and the SEND Case Officer must be invited to the review meeting, but they are not required to attend. It is essential that the professionals contribute to the review process by providing their advice and that SEND Case Officers contribute by processing the paperwork afterwards and updating the EHCP where necessary, so these tasks will be prioritized, even if meeting attendance is not possible.

Q3. How are children and young people involved in the annual review of their EHC Plan?

Children/young people are central to the annual review process and all educational settings should ensure that their views are included as much as possible in the annual review process. It is important that children/young people are able to participate and contribute to the review of their EHC Plan. All participation should be meaningful and will therefore be determined by the child/young person's age and needs. The educational setting should gather their views about their progress and the agreed outcomes that they are working towards. The educational setting should support your child to understand what will happen at the annual review and how they can contribute and share their views both before, and where possible, during the review meeting.

Q.4 How are parents/carers involved in the annual review of their child's EHC plan?

The educational setting should agree a date for the annual review meeting as early as possible. You will be sent an invitation to the review along with a form on which you can provide your views about your child/young person's progress over the last year. This form should be returned to the educational setting prior to the annual review meeting. This will be an automatic process for anyone under 18, and with consent or as a 'best interests' decision for anyone over 18.

At the annual review meeting, you will have the opportunity to discuss the paperwork you have received and ask any questions that you may have about your child's current progress and the agreed outcomes that they will be working towards.

Q5. How will the SEND Case Officer take part in the review process?

The SEND Case Officer will receive the paperwork in advance, and they are responsible for confirming decisions after compliant review paperwork has been sent in to the LA, as well as updating the EHCP if required. They also always try to attend priority review meetings, virtually or in person, which includes:

- Reviews in preparation for transition to a new Key Stage or setting
- Reviews where there is a possible breakdown of placement, or a new placement being requested out of expected transfer times
- Reviews where there are significant changes in need or provision that require substantial amendments to the EHC Plan

However, the review meeting must go ahead, regardless of the presence of the SEND Case Officer. However, if you have any questions or concerns about your child's EHCP or related matters that you want to discuss with your SEND Case Officer, you can contact them before or after the meeting. Direct contact details for all SEND Case Officers can be found on the Bexley Local Offer at: [Contact details for SEND](#)

[Team.](#)

The main responsibility of your SEND Case Officer is to read the review report sent in by the educational setting and either confirm with you that the EHCP remains unchanged, or else process any requests for changes. This will take priority over meeting attendance, as this cannot be done by anyone else and must be done in a timely manner.

Q6. What will happen at the annual review meeting?

The meeting itself should be a discussion about the your child's progress towards the outcomes in their EHC plan and whether any changes are needed to Plan itself, rather than being a general discussion about all things education. Each educational setting may chair their review differently but generally the meeting agenda will cover the following points.

- Introductions
- Purpose of the meeting
- Confirmation of the reports received
- Confirmation of the parental and pupil views
- Review of progress against the outcomes of the EHC plan.
- Any requested changes to the plan based on professional advice received, including the setting's own advice
- Planning the school-based targets to support the outcomes for the next twelve months, including any further actions
- Discussion of any other related matters, such as upcoming transitions
- Summary of and recommendations from the Annual Review.

Q7. What happens after the EHC plan annual review meeting?

Within two weeks of the annual review meeting taking place, the educational setting must send the completed review report to the Local Authority and to everyone who was invited to the meeting. They do not need to send any documents which have previously been circulated, but must include any new documents or reports that were not circulated before the meeting.

Once they have received the completed annual review report, your SEND Case Officer will review the documentation. They will then write to you within 4 weeks to:

- 1) Inform you that no changes were requested and no amendments will be made to the EHC plan, **or**
- 2) Inform you of the local authority's decision regarding the requested amendments, **or**
- 3) Inform you that the EHC plan will be ceased as it is felt that it is no longer necessary for it to be in place.

Q8. Where can parents/carers find out more information about annual reviews?

If you have questions about your child's annual review you should, in the first instance, contact the Special Educational Needs Co-ordinator (SENCo) at the educational setting your child attends.

If you would like to discuss significant changes to needs, provision or placement you can contact:

The Statutory Assessment Service

Email: specialneeds.els@bexley.gov.uk

Telephone: 0208 303 7777

If you would like information and advice about annual reviews that is independent of the Local Authority you can contact:

Bexley Independent, Advice and Support Service (IASS)

Email: bexleyIASS@bexley.gov.uk

Telephone: 0203 045 5976

If you would like signposting to information about annual reviews from the independent parent/carer forum Bexley Voice, you can look on their website or book to attend an event, via:

Bexley Voice parent/carer forum

Website: www.bexleyvoice.org.uk

The SEND Code of Practice: 0 to 25 years (2014) contains more detailed information about annual reviews. Please follow this link <https://www.gov.uk/government/publications/send-code-of-practice-0-to-25>