

Understanding Phase Transfer

Bexley SEND IASS

Bexley Information, Advice & Support Service.

Welcome to the Bexley Information Advice & Support
Service (IASS)

IASS is an impartial & confidential service offering information, advice and support to parents and carers of children with Special Educational Needs and/or Disabilities (SEND) and young people with SEND up to 25 years.



Before we begin

- Let's create a safe digital space
- Let's be open and not judge people for getting things wrong
- We can challenge discrimination, ideas but not people
- We will be considerate and compassionate
- We will be kind to ourselves



Positivity and
encouragement.



AVOID DISTRACTIONS



Video on. Mic off.

Phase Transfer – Supporting SEN Children and Families

- Understanding what Phase Transfer is
- Key dates and legal guidance
- Parent Carer / YP involvement
- Signpost / Support

Purpose of the Session

- Explain Phase Transfer
- Outline what the law / guidance says
- Share key timescales
- Ensure parents feel informed and empowered

What is Phase Transfer?

- Planned move between stages of education
- Especially relevant for children and young people with EHCPs
- A process over time, not a single event

Common Phase Transfers

- Early Years to Primary
- Primary to Secondary
- Secondary to Post-16

The Legal Framework

- Children and Families Act 2014
- SEND Code of Practice (0–25)
- Statutory duties for Local Authorities

What the Law & Guidance Says

- EHCPs must reflect current needs
- Parents' views must be considered
- Transitions should be planned early

Key Phase Transfer Dates

- **Regulation 18 of The SEND Regulations 2014** states that the EHC plan must be reviewed and amended before
- **31 March** if the transfer is from secondary school to a post-16 institution
- **15 February** in any other case, or
- If a young person is moving from one post-16 institution to another post-16 institution at any other time, **at least five months before that transfer takes place** (IPSEA)

Why These Dates Matter

- They are set in law & guidance
- They allow time to prepare
- They protect continuity of support

The Phase Transfer Process: 1

1. Annual Review:

Eg: For transfer to secondary school, The review meeting itself should happen usually in the autumn term of year 5

Schools must send the review paperwork to the local authority within **2 weeks** of the meeting.

2. Consultation with settings:

After the review, the local authority must consult with schools or settings. Parents have the right to **express a preference**.

- a maintained school or nursery (mainstream or special)
- an Academy (mainstream or special)
- an institution in the Further Education sector
- a non-maintained special school
- a section 41 school. ([Section 41 schools/colleges | \(IPSEA\) Independent Provider of Special Education Advice](#))

The Phase Transfer Process: 2

The Local Authority has rights too:

The local authority (LA) can only refuse this request if there is a lawful reason to do so. These reasons are:

The setting is unsuitable for the age, aptitude, ability or special educational needs of your child, or

Your child's attendance there would be incompatible with the:
efficient education of others, or
efficient use of resources

The Phase Transfer Process: 3

3. Agreement on placement and updated Draft EHCP:

Key legal timeline: - Parents / YP must be given **15 calendar days** to:

- Comment on the draft (Draft Representation stage)
- Request changes
- Confirm the preferred school or setting

4. Final EHCP is issued:

The local authority must issue a Final EHCP naming a school/type of provision.

Key legal timelines: - For secondary transfer: **by 15 February**
For other phase transfers: **by 31 March**

5. Transition

Naming a school is not the end of the statutory process.

The local authority has a duty to ensure the provision in the EHCP is in place from the first day of the new placement.

The Role of Parent carers

- Parent carers are partners
- Your knowledge matters
- You can ask questions

The Parent and CYP Key Rights

- To express a preference
- To be involved in planning and decisions
- Right to appeal decisions

PHASE TRANSFER - A QUICK GUIDE FOR PARENT CARERS AND YOUNG PEOPLE



Supporting Children Emotionally

- Gradual transitions
- School visits
- Listening to the child

Common Questions from Parent Carers

- **“Do I get a say in which school my child goes to?”**
- **“Can I ask for a special school or specialist provision?”**
- **“What if the school I want says it can’t meet my child’s needs?”**
- **“What if the local authority names a school I don’t agree with?”**
- **“What happens if deadlines are missed?”**
- **“Should I accept the Draft EHCP even if it isn’t right?”**
- **“Does agreeing to the plan mean I can’t appeal later?”**
- **“What if my child is anxious about the move?”.**
- **“Who makes sure the support actually happens?”**

Final Message

- Phase Transfer is a statutory process – not a single event
- You are not alone
- Advice and information are available



Where to Get Support

- Bexley SEND IASS: [RESOURCES LIBRARY | Bexley IASS](#)
- Bexley Local Offer: [Schools - Moving from Primary School \(Year 6\) to Secondary School \(Year 7\) | Bexley Local Offer](#)
- School SENCO
- Local Authority SEN Service: [Bexley SEN Statutory Assessment Service - Contact details for SEN Case Officers and SEN Management/Administration | Bexley Local Offer](#)
- IPSEA: [Moving to a new phase of education with an EHC plan | \(IPSEA\) Independent Provider of Special Education Advice](#)
- [The annual review process | \(IPSEA\) Independent Provider of Special Education Advice](#)
- [What sections should an EHC plan have? | \(IPSEA\) Independent Provider of Special Education Advice](#)

Bexley IASS Contact Details

Telephone: 020 3045 5976

Email: bexleyiass@bexley.gov.uk

Website: www.bexleyiass.co.uk

