



Worcestershire County Council

Educational Health Care Plan (EHCP) Annual Reviews for Early Years Providers

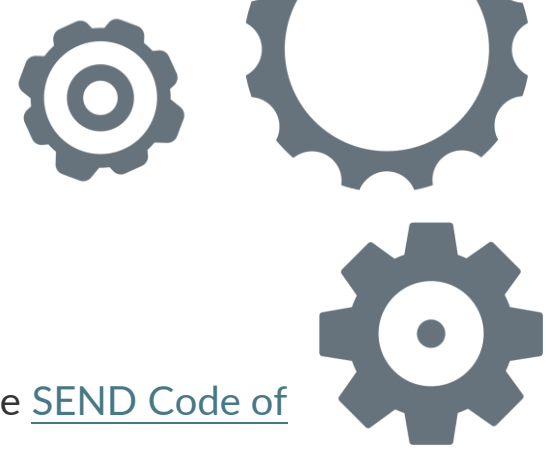
Written and presented by the
Early Years Inclusion Area SENCo Team



Content:

- Understanding the content of an EHCP
- Annual Reviews in the SEND CoP
- The purpose of a review
- Reviewing the EHCP
- Timeline
- Documentation needed
- Invitations to the meeting
- Person centred approach
- The meeting
- After the meeting & uploading documentation

Understanding the EHCP content



- **Common features of an EHCP**
- EHCPs may vary on the individual, however they have to be based on plans drawn up in chapter 9 of the [SEND Code of Practice](#), which lays down some common features or sections that all EHCPs must include:
- **section A:** family views and aspirations
- **section B:** his or her special educational needs (SEN)
- **section C:** any health needs that are related to his or her SEN
- **section D:** his or her social care needs
- **section E:** what outcomes you're hoping to achieve, including your long-term hopes for his or her adult life
- **section F:** what special educational provision he or she requires
- **section G:** what health care provision he or she may require
- **section H:** what social care provision or support he or she may require
- **section I:** the name of your child or young person's school or other placement, and what kind of institution it is
- **section J:** this covers the Personal Budget. If you have one, and how it may be used to meet any outcomes
- **section K:** appendices (the advice and information that was gathered when the EHC needs were being assessed)

Annual Reviews and the SEND CoP.



SEN CoP 2015 p102 section 6.53 – 6.56

Review

- 6.53 The effectiveness of the support and interventions and their impact on the pupil's progress should be reviewed in line with the agreed date.
- 6.54 The impact and quality of the support and interventions should be evaluated, along with the views of the pupil and their parents. This should feed back into the analysis of the pupil's needs. The class or subject teacher, working with the SENCO, should revise the support in light of the pupil's progress and development, deciding on any changes to the support and outcomes in consultation with the parent and pupil.
- 6.55 Parents should have clear information about the impact of the support and interventions provided, enabling them to be involved in planning next steps.
- 6.56 Where a pupil has an EHC plan, the local authority **must** review that plan as a minimum every twelve months. Schools **must** co-operate with the local authority in the review process and, as part of the review, the local authority can require schools to convene and hold annual review meetings on its behalf. Further information about EHC plan reviews is given in Chapter 9, Education, Health and Care needs



Reviews of EHC plans for children aged 0 to 5

9.178 Local authorities should consider reviewing an EHC plan for a child under five at least every three to six months to ensure that the provision continues to be appropriate. Such reviews would complement the duty to carry out a review at least annually but may be streamlined and not necessarily require the attendance of the full range of professionals, depending on the needs of the child. The child's parent **must** be fully consulted on any proposed changes to the EHC plan and made aware of their right to appeal to the Tribunal.

Transfer between phases of education

9.179 An EHC plan **must** be reviewed and amended in sufficient time prior to a child or young person moving between key phases of education, to allow for planning for and, where necessary, commissioning of support and provision at the new institution.

The review and any amendments **must** be completed by 15 February in the calendar year of the transfer at the latest for transfers into or between schools. The key transfers are:

- early years provider to school

[EHCP Annual Reviews | Worcestershire County Council](#)

Call the helpline: [01905 845579](tel:01905845579)

Email: sen@worcestershire.gov.uk

Purpose of the review



- To gather and assess information so that it can be used by your child or young person's early years settings, schools or colleges to support their progress and their access to teaching and learning.
- To review the special educational provision made for your child or young person to make sure it is being effective in ensuring access to teaching and learning and good progress.
- To review the health and social care provision made for your child or young person and its effectiveness in ensuring good progress towards outcomes.
- To consider the continuing appropriateness of the EHC plan in the light of your child or young person'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.
- To set new interim targets for the coming year and where appropriate, agree new outcomes.
- To review any interim targets set by the early years' provider, school or college or other education provider.

EHCP Reviews – must!



- [EHCP Annual Reviews | Worcestershire County Council](#)
- **must** be undertaken in partnership with the family, and your child or young person and
- **must** take account of child & parent views, wishes and feelings, including their right to request a personal budget.
- **must** be focused on the child or young person's progress towards achieving the outcomes in their EHCP, as well as considering whether the outcomes and any targets are still appropriate



The Review

The five parts of the annual review:

An annual review consists of five parts:

1. Information is collected
2. Invitations are sent to the relevant people
3. The annual review meeting is held
4. The head teacher or SENCO writes a report of the review meeting and sends it to you and the local authority
5. The local authority reviews the child's plan.

The review is not completed until all five stages have been done.

*you (parent)

Timeline

[Timetableguide.pdf](#)

Step 1: 4- 6 weeks prior to meeting obtain advice and information about the child including completing the Parental Views and Child's views forms (or similar)from:

- all the relevant professionals
- the parent
- the child themselves.

Step 2: 2 weeks prior to meeting.

- Circulate the reports received along with the invitations to attend the Annual Review meeting.

Step 3: The Annual Review meeting

Step 4: Following the meeting the SENCo must complete the WCC Annual Review Report document (that SEND services have sent to you or you have downloaded). This should include recommendations for amendments to the EHCP including details where views differ. This must then be uploaded onto the WCC portal (with the evidence) and shared

Step 5: The LA has 2 weeks (4 weeks from the date of the meeting) to decide to leave the plan unchanged, amend it or cease it and inform the parent, the child and the school/setting of its decision with everyone invited to the meeting **within 2 weeks including the LA.**

Step 1:- Gathering the documents needed to complete the review and upload to SEN services portal



- A copy of the current EHCP
- Targets and provision for section F
- The Annual Review Report from WCC caseworker or SEN Services- see next slide
- Parental and EYs my views- found here [Professionals' Toolkit | Worcestershire County Council](#)

EHCP annual reviews



EHCP annual reviews



Download:

- [Annual Review Appendix 1 Parental Views September 2010 \(Word DOCX\)](#)
- [My Views - Early Years January 2018 \(Word DOCX\)](#)
- [My Views - First Primary and Middle January 2018 \(Word DOCX\)](#)
- [My Views - Secondary and College January 2018 \(Word DOCX\)](#)

Please complete the form electronically and send it to the SEND department either via Children's Services Portal or secure email sen@worcschildrenfirst.org.uk

Paper copies can no longer be accepted.

ANNUAL REVIEW REPORT
Education, Health and Care Plan FOR THE ACADEMIC YEAR 20_/20_

Educational Establishment:	
Tel No:	Nature of Review:
SENCo/Review lead:	
EHCP issue date:	Date of Review meeting:
Social Care Status:	
Current NCY Group:	NCY Group offset? YES/NO Chronological NCY:
Attendance/percentage	_ sessions out of _

Stage 1 - Learner Details	
Name:	DOB:
Home Address:	
Postcode:	
Name of Parents/Carers: all as detailed on EHCP.	
Email Address:	
Telephone Numbers; Home:	
Mobile:	
Mobile:	

Stage 2 – Recommendations of the Review (at a glance)

Does the Education, Health and Care Plan need to be maintained? YES/NO										
Changes Required? YES/NO If changes are required, please indicate clearly below to which Section of the EHCP they apply; please X all that apply.										
Section:	A Child Profile	B Educational Needs	C Health Needs	D Social Care Needs	E Outcomes	F Educational Provision	G Health Provision	H1/H2 Social Care Provision	I Placement	J Personal Budget
Changes:										
If requesting changes to section I (placement) what is the name of the school/college/educational establishment being requested?										
Progress: Please X the overall level of progress made by the individual student.										
Below expected			Expected			Above expected				
Year 9 or above. Please indicate if the following preparing for adulthood topics have been discussed:			Higher Education and/or employment		Independent living		Participating in society		Being healthy	

Stage 3 – Attendance and contributions to the current review (please make additions or deletions as necessary)

Parental Comments and Child's Views (Early Years)

Professionals' Toolkit | Worcestershire County Council



Annual Review Appendix 1

Annual Review - Parental Comments

1 year we talk about your child's Special Educational Needs to make sure they are being met. Please would you complete this form and comment on your child's progress over the past year. It might be helpful to refer to last year's report. If you would like help with the completion of this form please contact:

☎ Parent Partnership Service on 01905 727940.

What has your child achieved in school during the last 12 months?

Child's Views (Early Years)

If you would like to tell us all about you in another way, for example a letter, picture or recording then please do so.

Name _____ School/Setting _____

Put a ring around the face that shows how you feel

I like <u>school</u>			
School helps <u>me</u>			
The work in school is <u>easy</u>			
My friends help me with my <u>work</u>			
Adults in school help <u>me</u>			
I understand what teachers are saying to <u>me</u>			

I like school because:

I don't like school because:

The things that make me happy are:

The things that make me sad are:

I work best when:

I would like to get better at:

Things I would like to do when I am older:



Child's views can also look like this in the EYs



Support with social skills



Support with communication



Support to follow routines/
adult direction



Support for self-care

Step 2:-Invitations to the meeting



The provider must invite the following people to the meeting:

- **The child's parent(s)**
- **The manager/SENCo of setting.**
- **Someone from the local authority special educational needs (SEN) department.
(Case worker named on plan)**

(If involved)

- **Someone from the local authority social services department.**
- **A health professional.**

The EY provider may also invite other people involved in supporting the child and the setting, for example the child's key worker, speech and language therapist, an Area SENCo. In practice, who attends will depend very much on your child's needs and circumstances.



Other examples of who may be invited (depending on involvement):

- Educational Psychologist
- Hearing impairment team
- Visual impairment team
- Physical disabilities team
- Complex Communication team
- Learning support team
- Paediatrician
- Child development team
- Child development centre
- Specialist play
- Occupational therapist
- Physio therapist

Step 3- the meeting- using a Person-centred approach



During the EHCP review meeting it is important to use a person-centred approach. This is a way of working that:

- puts children, young people, and families at the center of the discussions
- recognises that everyone has the right to have choice and control in directing their lives and the support they receive
- listens carefully to what is important to the family now and in the future.
- listen to what professionals say is important for the child.

During the meeting it will be agreed which actions or changes are needed based on the evidence from parents or carers, children and young people, and assessing professionals.

Decisions will be made collaboratively and fairly, this means that parents, carers, children, and young people may not always be able to have exactly what they want in their EHC plan.


However, we must take careful consideration of what the child needs and make sure that child's advocates/parents can explain what they and their child need from the assessment.

During the Review Meeting

- Collaboratively review the child's progress towards the outcomes.
- Discuss and formulate new clear outcomes together.
- Discuss activities and the support needed to help the child achieve the outcomes.
- Begin completing the Annual Review Report- use this as a guide for the layout of the meeting

[EHCP Annual Reviews | Worcestershire County Council](#)



WORCESTERSHIRE CHILDREN FIRST  Please complete the form electronically and send it to the SEND department either via Children's Services Portal or secure email sen@worcschc@nhs.uk. Paper copies can no longer be accepted.

ANNUAL REVIEW REPORT
Education, Health and Care Plan FOR THE ACADEMIC YEAR 20_/_20_/_

Educational Establishment		Nature of Review		Stage 1 - Learner Details	
Tel No		SENCo/Review lead		Name	
EHCP issue date		Date of Review meeting		Home Address	
Social Care Status		Current NCF Group		Postcode	
Attendance/percentage		Sessions out of		Name of Parents/Carers: all as detailed on EHCP	
				Email Address	
				Telephone Numbers: Home	
				Mobile	
				Mobile	

Stage 2 - Recommendations of the Review (at a glance)

Does the Education, Health and Care Plan need to be maintained? YES/NO

Changes Required? YES/NO If changes are required, please indicate clearly below to which Section of the EHCP they apply, please X all that apply.

Section:	A	B	C	D	E	F	G	H/H2	I	J
Changes:	Care/Provision	Education Needs	Health Needs	Social Care Needs	Outcomes	Education Provision	Health Provision	Social Care Provision	Placement	Parental Budget

If requesting changes to section I (placement) what is the name of the school/college/educational establishment being requested?

Progress: Please X the overall level of progress made by the individual student.

Below expected	Expected	Higher Education and/or employment	Independent living	Above expected

Year 8 & above: Please select all that the following objectives for individual topics have been discussed

Stage 3 - Attendance and contributions to the current review (please make additions or deletions as necessary)

EHCP AR Report January 2019

Possible Review meeting Agenda



- Welcome and introductions
- Shared understanding of procedures and person-centred approach
- Review previous outcomes and the child's progress towards them
- Each outcome discussed

This may be completed as a joint activity-

- ✓ on a large A3 paper – pens available for everyone
- ✓ post on a wall or on tables
- ✓ allow everyone to move around the room and read the outcomes, they can write their thoughts about the outcomes under each heading
- ✓ allow a minimum of 15-20 minutes for this activity

This may vary depending on the number of attendees, eg if only 2 or 3 it may be completed as a discussion

The image shows a screenshot of the 'ANNUAL REVIEW REPORT' form for Worcester Children First. The form is titled 'Education, Health and Care Plan FOR THE ACADEMIC YEAR 20_/20_'. It includes sections for 'Stage 1 - Learner Details' (Name, DOB, Home Address, Postcode, Email Address, Telephone Numbers, Mobile) and 'Stage 2 - Recommendations of the Review (at a glance)'. The 'Stage 2' section contains a table for 'Changes Required?' with columns for various sections (A-J) and a 'Changes:' row. Below this is a 'Progress' section with a table for 'Please X the overall level of progress made by the individual student.' and a 'Stage 3 - Attendance and contributions to the current review' section. The form also includes a header with the Worcester Children First logo and a footer with the text 'EHCP AR Report January 2019'.



Your room might look like this



Or this...



The important message is that the EHCP is reviewed and the views of the family (and child) along with any professionals involved are captured and noted.

During the meeting review each section of the Plan- follow the Annual Review Report document



- **Section B – special educational needs.**

This should be an accurate description of how the child learns and what they can and cannot do.

- **Section C:** healthcare needs
- **Section D:** social care needs
- **Section E:** The focus of the plan shows the outcomes for the child.
- **Section F:** what special educational provision/support he or she requires
- **Section G:** what health care provision/support he or she may require
- **Section H:** what social care provision or support he or she may require (is this a CLA child?)
- **Section I:** Will the child be moving to school in the next two years?

Long Term: What does the family want from the review long term and what do they need to help them achieve this?

Step 4: At the end of the meeting

- The SENCo of the setting will make notes to feed into the annual review feedback form/complete the form at the review

- Shared agreement is needed for which outcomes need to be continued

Check:-

- ✓ Are there any that are no longer relevant ?
- ✓ Are there any new outcomes to be added?
- ✓ Is the child moving school? What transition plans need to be put into place?

- Agree new formulated final outcomes for the next EHC plan

- Ensure you have discussed and noted which strategies, and support needs to be in place for the child to make progress towards the new outcomes



WORCESTERSHIRE CHILDREN FIRST 

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ANNUAL REVIEW REPORT

Education, Health and Care Plan FOR THE ACADEMIC YEAR 20_/_20_

Educational Establishment		Name:	
Tel No:	Nature of Review:	DOB:	
SENCo/Review lead:		Home Address:	
EHCP issue date:		Postcode:	
Date of Review meeting:		Name of Parents/Carers: all as detailed on EHCP.	
Social Care Status:		Email Address:	
Current NCY Group:		Telephone Numbers, Home:	
NCY Group offset? YES/NO		Mobile:	
Chronological NCY:		Mobile:	
Attendance/percentage		_ sessions out of _	

Stage 2 – Recommendations of the Review (at a glance)

Does the Education, Health and Care Plan need to be maintained? YES/NO

Changes Required? YES/NO If changes are required, please indicate clearly below to which Section of the EHCP they apply; please X all that apply.

Section:	A	B	C	D	E	F	G	H/H2	I	J
Changes:	Child Profile	Educational Needs	Health Needs	Social Care Needs	Outcomes	Educational Provision	Health Provision	Social Care Provision	Placement	Personal Budget
If requesting changes to section I (placement) what is the name of the school/college/educational establishment being requested?										
Progress: Please X the overall level of progress made by the individual student.										
Below expected	Expected		Above expected							
Year 9 or above. Please indicate if the following enquiries for adulthood topics have been discussed:			Higher Education and/or employment	Independent living	Participating in society		Being healthy			
Stage 3 – Attendance and contributions to the current review (please make additions or deletions as necessary)										

EHCP AR Report January 2019



Upload the completed Annual Review Report, the child's views and the parental views along with any other professional reports and information within 2 weeks of the meeting and share with the attendees.

<https://ehmportal.worcschildrenfirst.org.uk/web/portal/pages/sendpage>

Welcome to Worcestershire County Council

Referral to children's social care (level 4) Safeguarding referrals for Worcestershire County Council	Request for service – family support Request services from Early Help family support	Professional Request for information / adoption For professional use only	EHCP Forms Worcestershire SEND referrals
LADO For concerns about adults working with children	Police Portal Police Portal	Reducing Parental Conflict Targeted Requests Reducing Parental Conflict Targeted Requests	



SEND Referral Page

This section of the portal contains forms that can be submitted to Worcestershire County Council for SEND referrals.

**EHC Needs Assessment
Form**

EHCP Transfer In

EHCP Annual Review Form

Early Year Inclusion Notification

For Health and/or EY Providers

1 Annual Review >

2 Your Details >

3 Person's Details >

4 Supporting Documentation >

5 Submit >

Annual Review


Use the numbered menu items on the left or use the **Next →** and **← Previous** options to move through the pages.

Don't use the Browser 'Back' button


Questions

You **DO NOT** need to answer every question, you need only complete what is relevant.

Select the option(s) that best suit your response

This symbol  indicates that the question is mandatory and must be answered in order to continue.

Save the Form

Use the **Save for Later** option to **Save** the form to return to at any time. 

Print the Form

Use the **Print** option to **Print** a copy of the form if required. 

Next →



- 1 Annual Review >
- 2 Your Details >
- 3 Person's Details >**
- 4 Supporting Documentation >
- 5 Submit >

Person's Details

Who is this about

I am completing this form as a *

Your relationship to person *

First name *

Last name *

Date of birth *

Is date of birth estimated?

Pronouns

Gender *

Ethnicity



[1 Annual Review](#)

[2 Your Details](#)

[3 Person's Details](#)

[4 Supporting Documentation](#)


[5 Submit](#)

Supporting Documentation

You will only be able to attach the following file types:

- Word Documents
- PDF Files
- Images (in jpg / jpeg / png format)

For Annual Reviews, please send any oversized documents to either North Area Team (sennorth@worcschildrenfirst.org.uk) for Bromsgrove, Redditch and Wyre Forest or South Area Team (sensouth@worcschildrenfirst.org.uk) for Worcester, Malvern, Wychavon (based on pupils' home postcode).

 Upload Document

[← Previous](#)

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[Create PDF](#)

[Close](#)

[Cancel](#)

Upload the completed Annual Review Report, the child's views and the parental views along with any other professional reports and information. Submit!

Step 5:

The LA has 2 weeks (4 weeks from the date of the meeting) to decide to leave the plan unchanged, amend it or cease it and inform the parent, the child and the school/setting of its decision.





Other training available:

Hereford and Worcestershire SENDIASS Welcome to SENDIASS Herefordshire and Worcestershire | Worcestershire County Council

Workshops currently available for **Professionals**:

- [Autism & Me \(Developed by Autistic Young People\) Workshop for Professionals- HW SENDIASS](#)
- [Herefordshire and Worcestershire SENDIASS Online Information Session for Professionals](#)
- [Special Educational Needs \(SEN\) Support and The Graduated Response in Schools Workshop for Professionals- HW SENDIASS](#)
- [What Does a Good Education Health and Care Plan \(EHCP\) look like? Workshop for Professionals- HW SENDIASS](#)

All sessions are interactive, enabling participants to ask questions.

If you have any questions about the workshops or would like to host a session at your setting, please contact SENDIASSTraining@worcestershire.gov.uk for more information.



Useful Links

[What is an Annual Review?](#)

councilfordisabledchildren.org.uk

[Annual Review of an Education Health and Care Plan](#)

worcestershire.gov.uk

[EHCP Annual Reviews | Worcestershire County Council](#)

[The annual review process | \(IPSEA\) Independent Provider of Special Education Advice](#)

Any enquires :

- **SEN services** sennorth@worcestershire.gov.uk
- **SEN services** sensouth@worcestershire.gov.uk
- SEN@worcestershire.gov.uk
- **01905 845579**