

EHCP Annual Review: Guidance for SENCos

SEN Code of Practice

9.166: EHC plans should be used to actively monitor children and young people's progress towards their outcome 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.

9.167: 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 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
- 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

9.168: Reviews must be undertaken in partnership with the child and their parent or the young person, and must take account of their views, wishes and feelings, including their right to request a Personal Budget. For further information, refer to the SEN Code of Practice, p194 onwards.

Timescales

9.169: The first review must be held within 12 months of the date when the EHC plan was issued, and then within 12 months of any previous review, and the local authority's decision following the review meeting must be notified to the child's parent or the young person within four weeks of the review meeting

9.176: The school (or, for children and young people attending another institution, the local authority) must prepare and send a report of the meeting to everyone invited within two weeks of the meeting.

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.

Suggested timeline:

Week 1 – Set the date of the Annual Review

Week 6 – Contribute advice on the EHCP Hub

Week 8 – Annual Review meeting

Week 10 – Submit the Annual Review report to the Local Authority

Week 12 – Local Authority make a decision to maintain, amend or cease the EHC Plan

Week 16 – EHC Plan is finalized.

Arrange the Annual Review

- Ensure that your profile is updated with your correct details, including job role. This will then prepopulate sections of the review.
- Within your live cases, when a review is due you will see it says, 'review pending'. Note: you will not be sent a reminder, so ensure you are aware of when they are due.
- The EHC Hub will tell you the date that the EHC plan must be reviewed by. This is the date by when the Local Authority must publish their decision on the outcome of the annual review, not the actual meeting date.
- Note: the annual review should be 12 months from the previous annual review, not the date the plan was finalised. The EHC Hub will clearly show if the deadline is overdue.
- Select the child/ young person and click start review.
- Add the date, time and venue for the review meeting.
- Invite the case co-ordinator.
- Invite parents/ carer or guardian.
- Invite professionals:
 - The EHC Hub will show some pre-populated people, check these remain relevant.
 - When inviting professionals, use the generic team email, rather than individual professionals. The team will then allocate the appropriate professional.
 - If you are adding a professional to an annual review (e.g., ASET/BST/EP etc) ensure you click on 'request information'. If you do not do this the teams can't accept / decline or assign cases and are having to contact SENCos to ask them to amend this in order to progress with the hub requests.
 - Always invite the Disability Service, they will triage the cases to determine whether advice will be submitted.
 - Where there is an allocated social worker, the Disability service will be responsible for liaising with the worker about uploading information to the HUB. Please note the allocated social worker will not have access the HUB themselves and the disability team upload contributions supplied by social workers.
 - Allocated social workers will not see review dates for meetings, they will need to be notified by the school separately should you wish for them to attend.
 - If you wish to invite a named professional from within your setting e.g., a class/ subject teacher, you are able to name and invite them.
- You can only request information from those who have been invited. If they do not have access to the EHC Hub, the system will automatically invite them to create an account and the case will be linked to this.
- The EHC Hub sends out email invitations automatically.
- The meeting details can be edited and saved, then the EHC Hub will update those who are invited.
- There is now an option to abandon a review you have arranged. You will be asked for a reason and once deleted it will return to the original date. However, be aware that once abandoned, all information will be permanently deleted in relation to the annual review.

Contribute Views

- Everyone who has been invited will automatically be transferred through to the 'contribute views' section. You will then need to select 'request information'.
- Once teams allocate a professional, their name will appear.
- If you need to request advice from another team, you will need to go back to the 'arrange' stage and invite them.
- If you are submitting information on behalf of someone else, there is now a facility to add their details.
- Submitting advice from the setting (SENCo):
 - You able to comment on all areas of the plan. For example, adding new areas of need or amending existing needs (Section B), or adding new outcomes and provision for other SEND areas of need.
 - You can save and download your draft (only you can see this prior to submission).
 - Outcomes and provision from the EHCP will automatically be transferred for you to comment on. You will be asked to select from a drop-down menu whether the outcome has been achieved.
 - Avoid selecting the 'not able to comment' option. Ensure that, alongside each of the outcomes, you

- include commentary to specifically support the judgement that you have made. For example, if you are saying a child/ young person is not on track, be explicit in explaining what they are able to do.
- If a child/ young person has cognition and learning needs identified, be sure to include details of their attainment and progress since the last review within the commentary.
- When identifying new outcomes, ensure that they are SMART (Specific, Measurable, Achievable, Realistic and Timed). Clearly specify and quantify additional provision, including steps to achieve these outcomes. For support needed, include the name of interventions/ provision, who will provide the support, how often it is provided (e.g., daily or 3 x week), duration (e.g., 20 minutes) and group size (e.g., 1:1 or small group of 3).
- It is essential to consider transparency within the information you submit. All information will be accessed by all agencies, parents and, where appropriate, the child/ young person on the EHC Hub. Therefore, the use of sensitive language and writing in a strength-based way is essential.
- Relevant documents can be uploaded to support the advice:
 - As there is no section for attainment and progress information, this should be attached. Be clear and specific with respect to attainment levels over time, i.e., evidence progress. For example, current level of attainment compared to last term/beginning of academic year/last year/end of key stage. What has happened to the gap? Where descriptors are used that are bespoke to your school (words/letters/colours) ensure that a 'key' is included.
 - It is essential to ensure all documents submitted adhere to GDPR, for example, redact names of other child/ young person on all reports, CPOMs, etc.
 - Child/ young person and Parent/ Carers Views:
- Child/ young person and parent/ carer views are automatically transferred from the previous EHC plan.
 - The parent/ carer will be invited to update their views on the EHC Hub, as will the child/ young person if appropriate.
 - As SENCo you will have access to the child/ young person and parent/ carer views. This enables you to support them to update their views in these sections. It is essential for SENCos to consider what support parent/carers and the young person may need to complete their sections. For example, either encourage them to log on, or, if sections are not fully populated, provide further support.
 - If you are supporting the parent/carers or the young person to record their views, ensure that you explicitly state who is recording the views on their behalf.
- You cannot progress to the next stage until at least one contribution of advice has been submitted, this will allow you to 'progress to the meeting' stage.
- You should 'progress to the meeting' stage 2 weeks before the actual meeting to ensure all involved have access to this information within timescales.

Meeting

- At the 'meeting' stage, you will be able to see who has been invited and you will be able to record who has attended the meeting. Ideally the child/young person, parent/carers and professionals involved should attend the review meeting.
- Currently, once you progress to this stage, no further advice can be submitted. However, you can attach further documents, which may have been received after the deadline.
- You could download this form to annotate during the actual review meeting, or you could add to the document directly on the Hub. No one else can see this while it is in draft form.

Report

- At the stage of the meeting and up until submission to the Local Authority, the annual review report is a working document that can only be viewed by the SENCo. A draft can be downloaded.
- Advice from all professionals, parents/ carers and the young person will automatically be transferred into the

report.

- In populating the annual review report, ensure all sections are complete:
 - In 'details of the child or young person's education setting' ensure to include attendance and exclusions.
 - Ensure relevant information is updated in 'transport assistance' and 'the child or young person's personal budget'.
 - Complete the summary/ recommendations section.
- Ensure information is populated for 'transitions and preparing for further education and adulthood'
 - The SEN Code of Practice states in section 9.184: All reviews taking place from Year 9 at the latest and onwards must include a focus on preparing for adulthood, including employment, independent living and participation in society.
 - It is good practice to consider preparation for adulthood from the earliest age. Further supporting information linked to all strands of preparation for adulthood for EYFS, Primary, Secondary and Post-16 can be found at: [Preparing for Adulthood: All Tools & Resources](#) - NDTi
- You will be asked whether you would like to 'Maintain the EHC', 'Amend the EHC', or 'Cease to maintain the EHC'.
- You will be asked if there have been any 'significant' changes since the last EHC was issued in relation to needs, outcomes and provision for SEN, Health and Social Care and whether any updated advice is required.
- There is a section to record a summary of the review meeting and record any agreed actions.
- Once you are happy the report is complete, select 'submit report'.
- This needs to be within 2 weeks of the meeting date (this is a statutory requirement).
- The EHCP case coordinator will receive a notification that this has been submitted.

Decision

- Once the report has been submitted, the EHC Hub will progress to the 'decision' stage.
- The EHCP case coordinator is responsible for completing this section, you will see displayed 'awaiting local authority decision'.
- Once the Local Authority has made a decision, all those involved will be notified.
- Following this, should the decision be for the Local Authority to amend the EHC Plan, you will receive a notification to view the draft plan.
- The review date for the next annual review will automatically be updated.

Further Guidance

The North Lincolnshire EHCP Hub: [Education, Health and Care Hub \(northlincsehchub.com\)](https://northlincsehchub.com)

Guidance Videos for the EHCP Hub available on the North Lincolnshire Local Offer: [SEND Local Offer | Training and Development for Professionals - SEND Local Offer \(northlincs.gov.uk\)](#)

SENCo – Arranging a review <https://openobjects.vids.io/videos/d49ddab9111ce7c15c/ehc-hub-senco-how-to-arrange-a-review-meeting-and-request-views>