Annual Review of an Education, Health and Care Plan

This paperwork records the annual review of the EHCP, including views, progress, provision and evidence to support the local authority's decision to maintain, amend, cease or reassess the plan.

1. Quick completion guide for SENCO's and meeting chairs

This guide is intended to reduce duplication and completion time. Complete the sections that are relevant to the child or young person's review and use "No change" or "Not applicable" where appropriate. Evidence only needs to be referenced once if it is attached or listed later in the document.

Always complete	Complete only if relevant, but acknowledge it has been checked	Complete only where change is requested
Child/Young Person Information; Review meeting record; Views and what matters now; Progress, provision and impact; Decisions and recommended changes; Final compliance, quality check and sign-off.	Health; Social care; Preparation for adulthood; Personal Budget; Actions following the annual review.	Outcomes and interim targets; Suggested changes to the EHCP; Evidence to support requested amendments. If no amendments are being requested, tick "No change" in the decision section and move on.

2. Child/Young Person Information

Information needed	Response / tick box
Name	
Preferred name	
Date of birth	
Year group	

Education setting	
Date of review meeting	
Child or young person views gathered before the meeting	
Parent/carer views gathered before the meeting	
Professional updates requested before the meeting	
Advice and information circulated at least two weeks before the meeting	

Statutory timing check: record whether the review was held within the required annual review timescale, advice was circulated at least two weeks before the meeting, paperwork was submitted to the local authority within two weeks of the meeting, and the local authority decision is due within four weeks of the review meeting.

3. Review meeting record

Name	Job role / organisation	Invited?	Attended?	If unable to attend, was a report submitted?

If an invited professional did not attend or provide advice, record steps taken to obtain their views and whether follow-up advice is needed before the local authority makes its decision.

4. Views and what matters now

My voice, my review, my story This section is all about what matters to the child or young person — their thoughts, feelings, hopes, worries and ideas.	
✨ **Choose how you shared your views — there is no one right way to be heard.**	
🎤 **How were views gathered? (please tick)**	☐ Direct conversation ☐ Drawing ☐ Written views ☐ Observation ☐ Communication aid ☐ Family-supported ☐ Professional-supported ☐ Other
😊 **Did the child or young person need support to share their views? If so, who supported them and how were their responses understood?**	
⭐ **What I want people to know**	
🌟 **Child or young person: What is going well for you with your learning?**	
🧩 **Child or young person: What is difficult for you or needs to change for you to make progress?**	
💞 **Child or young person: What is important in your life at the moment?**	

🚀 **Child or young person: Hopes or goals for the future**	
🏡 **What my family want people to know**	
🌼 **Parent/carer: What is going well?**	
💭 **Parent/carer: What is not working or causing concern?**	
🔄 **Parent/carer: Has anything significant changed since the last review?**	
🛠️ **Parent/carer: What support or outcomes do you feel need to change?**	

Meeting summary
Summarise progress, what is working or not working, barriers, differing views, evidence considered, agreed next steps and any unresolved issues for the local authority.

Overall learning, attendance and engagement summary		
Complete this section briefly to give an overall picture of how the child or young person is accessing learning. You do not need to repeat information provided elsewhere or attach detailed data if it is already included.		
Question	Response	Brief details
Is the child or young person making expected academic progress from their starting points?	☐ Yes ☐ Partly ☐ No ☐ Not enough information	Briefly note what progress has been made and any areas where progress is slower or causing concern.
Are there any attendance concerns affecting access to learning?	☐ Yes ☐ No ☐ Not applicable	Briefly note the current attendance pattern, key concerns, improvements or support in place.
Is the child or young person able to engage in learning across the school day?	☐ Yes ☐ Partly ☐ No	Briefly note what helps them engage and what gets in the way.

5. Progress, provision and impact

Use one row for each EHCP outcome being reviewed. Briefly record what the child or young person can now do, tick the closest progress position, confirm whether the provision has been delivered as written, and say whether the outcome should be kept, stopped or amended.

EHCP outcome	Progress position	Was Section F provision delivered as written?	What can the child or young person now do in relation to this outcome?	Keep outcome?
	☐ Achieved ☐ Good progress ☐ Some progress	☐ Yes ☐ Partly ☐ No	Briefly describe what they can now do, with evidence/reference if helpful.	☐ Yes ☐ No ☐ Amend

	☐ Limited progress ☐ No longer appropriate			
	☐ Achieved ☐ Good progress ☐ Some progress ☐ Limited progress ☐ No longer appropriate	☐ Yes ☐ Partly ☐ No	Briefly describe what they can now do, with evidence/reference if helpful.	☐ Yes ☐ No ☐ Amend
	☐ Achieved ☐ Good progress ☐ Some progress ☐ Limited progress ☐ No longer appropriate	☐ Yes ☐ Partly ☐ No	Briefly describe what they can now do, with evidence/reference if helpful.	☐ Yes ☐ No ☐ Amend
	☐ Achieved ☐ Good progress ☐ Some progress ☐ Limited progress ☐ No longer appropriate	☐ Yes ☐ Partly ☐ No	Briefly describe what they can now do, with evidence/reference if helpful.	☐ Yes ☐ No ☐ Amend

6. Anything impacting access to learning?

Current barriers to learning
Use this section to provide a brief narrative about whether anything is currently happening in the child or young person's life that is affecting their ability to access learning, take part in school life or make progress. This may include changes at home, attendance, friendships, emotional wellbeing, health, confidence, transitions, routines, safety, relationships or other circumstances. The focus should be on the child or young person's lived experience, the impact on their access to learning, and what may help. This section should not be used to list requests for additional funding.

7. Health

Health check-in question	Response	Brief details / next step
The meeting chair should ask attendees whether there have been any changes to health needs, health provision or wider circumstances that may affect the child or young person's wellbeing, access to learning or EHCP. This section should be completed even where there are no changes, so it is clear that health was discussed.		
Have there been any changes to the child or young person's health needs or circumstances?	☐ Yes ☐ No	Note any changes, or write "No changes".
Is any further health information or advice needed?	☐ Yes ☐ No	If yes, say what is needed and who will provide it.
Do the health needs or provision in the EHCP need updating?	☐ Yes ☐ No changes needed ☐ Not applicable	If yes, briefly describe what needs to change.
If there are no changes	☐ Health was discussed and no EHCP changes are needed.	

8. Social care

Social care check-in question	Response	Brief details / next step
The meeting chair should ask attendees whether there have been any changes to social care needs, family circumstances, support at home or care provision that may affect the child or young person's wellbeing, independence, access to learning or EHCP. This section should be completed even where there are no changes, so it is clear that social care was discussed.		
Have there been any changes to social care needs, family circumstances or support at home?	☐ Yes ☐ No	Note any changes, or write "No changes".

Is any further social care information or advice needed?	☐ Yes ☐ No	If yes, say what is needed and who will provide it.
Do the social care needs or provision in the EHCP need updating?	☐ Yes ☐ No changes needed ☐ Not applicable	If yes, briefly describe what needs to change.
If there are no changes	☐ Social care was discussed and no EHCP changes are needed.	

9. Preparation for adulthood (if appropriate)

From Year 9 onwards, reviews must consider preparation for adulthood, including employment, independence, community inclusion, relationships and health.	**Response / tick box**	**Further details**
Employment or training discussed? *For example: What jobs or courses interest the young person? What skills, qualifications, work experience or support will help them move towards this?*	☐ Yes ☐ No ☐ Not applicable	Brief details, actions or follow-up needed.
Independent living discussed? *For example: What can the young person do independently now? What support or teaching is needed for daily living, managing money, making choices or staying safe?*	☐ Yes ☐ No ☐ Not applicable	Brief details, actions or follow-up needed.
Community inclusion discussed? *For example: How does the young person take part in activities, friendships and their local community? What would help them feel included and build confidence?*	☐ Yes ☐ No ☐ Not applicable	Brief details, actions or follow-up needed.
Relationships and good health discussed? *For example: What support is needed to develop safe relationships, understand consent and*	☐ Yes ☐ No ☐ Not applicable	Brief details, actions or follow-up needed.

boundaries, manage health needs, access health services and maintain emotional and physical wellbeing?		
Independent travel or post-16 travel assistance discussed? *For example: How does the young person travel now? Could travel training increase independence? What safety, mobility or support needs may affect future travel arrangements?*	☐ Yes ☐ No ☐ Not applicable	Briefly note current travel arrangements, independence skills, safety needs, travel training, or any post-16 travel assistance that may need to be considered.
Are there any preparation for adulthood outcomes, provision or other EHCP amendments needed?		

10. Personal Budget

Question	Response / tick box
Is there an existing Personal Budget?	☐ Yes ☐ No ☐ Not known
Has the parent or young person requested a Personal Budget?	☐ Yes ☐ No
If yes, please detail Personal Budget request or discussion	

11. Recommendation to the local authority

Overall recommendation	Brief reason for recommendation

☐ **Maintain EHCP with no changes** ☐ **Maintain EHCP with amendments** ☐ **Reassessment recommended** ☐ **Change of placement requested** ☐ **Cease EHCP** ☐ **Other**	Briefly explain why this is the recommendation. If amendments are recommended, complete the proposed EHCP changes section below or attach a tracked draft amended EHCP.

12. Proposed EHCP changes

Complete this section only if changes are being requested, or to confirm that no significant changes are needed. It is normal for an EHCP to remain appropriate across a key stage where needs, outcomes and provision are still relevant. In those cases, the school or setting should continue to track progress through targets and provision working towards the existing EHCP outcomes. If you attach a draft amended EHCP with tracked changes, you do not need to list every wording change here, but you must record the EHCP section, the type of change and why it is needed.

Are significant EHCP amendments needed?	Response / explanation
☐ **Yes, proposed amendments are listed below or included in a tracked draft EHCP** ☐ **No, there are no significant changes warranting an amended EHCP at this review**	If no significant amendments are needed, briefly explain why the current EHCP remains appropriate and how progress will continue to be monitored through school or setting targets working towards the existing EHCP outcomes.

EHCP section	Type of change	Summary of change	Why is this needed?	Tracked draft attached?
e.g. Section B, E, F or I	☐ Add ☐ Amend ☐ Remove	Brief summary of the proposed change or refer to the attached tracked draft.	Explain the child or young person's need, progress, barrier or evidence that shows why this change is being requested.	☐ Yes ☐ No
e.g. Section B, E, F or I	☐ Add ☐ Amend ☐ Remove			☐ Yes ☐ No

e.g. Section B, E, F or I	☐ Add ☐ Amend ☐ Remove			☐ Yes ☐ No

13. Evidence supporting any recommendations

Evidence used	Status
Child or young person views	☐ Included in this review ☐ Attached ☐ To follow ☐ Not available
Parent/carer views	☐ Included in this review ☐ Attached ☐ To follow ☐ Not available
School or setting information	☐ Included in this review ☐ Attached ☐ To follow ☐ Not available
Professional advice	☐ Included in this review ☐ Attached ☐ To follow ☐ Not available
Progress or assessment information	☐ Included in this review ☐ Attached ☐ To follow ☐ Not available
Attendance or behaviour information, if relevant	☐ Included in this review ☐ Attached ☐ To follow ☐ Not applicable
Health or social care advice, if relevant	☐ Included in this review ☐ Attached ☐ To follow ☐ Not applicable
Anything missing or still to follow?	

14. Optional follow-up actions from the review meeting

Only complete this section if specific follow-up actions were agreed during the review meeting. Do not include routine actions such as submitting paperwork to the local authority unless there is a specific issue, delay or follow-up needed.

Follow-up action	Why this is needed	Who is responsible?	By when?

e.g. professional advice to follow, CYP views to be gathered in another format, health/social care follow-up, placement/provision information to be clarified.			

15. Final compliance, quality check and sign-off

Final check	Response
The review has been completed within the required annual review timescale.	☐ Yes ☐ No
Child or young person and parent/carer views are clearly reflected in the review.	☐ Yes ☐ No
Relevant advice and information has been requested, received and shared as required.	☐ Yes ☐ No
Progress, outcomes and provision have been reviewed.	☐ Yes ☐ No
Health, social care, preparation for adulthood and Personal Budget matters have been considered where relevant.	☐ Yes ☐ No ☐ Not applicable
The recommendation is clear, reasoned and supported by evidence.	☐ Yes ☐ No
Any agreed follow-up actions have been recorded, where applicable.	☐ Yes ☐ No ☐ Not applicable

16. Sign-off and submission details

Sign-off detail	Response / details
Review completed by	
Role	

Date review held	
Date submitted to local authority	
Date shared with parent/carer	
Date shared with child or young person, where appropriate	

What happens next?

Next steps after the review is submitted
• The completed review paperwork and any supporting evidence will be considered by the local authority. • The local authority will decide whether the current EHCP should be maintained, amended, ceased, or whether a reassessment is needed. • If the local authority agrees that a significant change is required, an amended EHCP will usually be issued so the proposed changes can be reviewed and responded to through the statutory amendment process. • If amendments are being considered, the local authority may use the review paperwork, evidence, professional advice and any tracked draft EHCP submitted with the review to inform the proposed changes. • If the local authority decides that the current EHCP remains appropriate, the existing EHCP may stay in place and this review document will sit alongside it as the record of the annual review discussion, progress and any updated information. • If there are outstanding reports, views or evidence still to follow, these should be provided as soon as possible so they can be considered before the local authority reaches or finalises its decision. • Parents/carers and the young person, where appropriate, will be notified of the local authority's decision and any next steps.