Guidance for Completing the Annual Review of an Education, Health and Care Plan

A clear guide to help families, young people, education settings and professionals record views, progress, provision and recommended next steps.

About this guide
This guide explains how to complete the Annual Review paperwork for an Education, Health and Care Plan. It is written for SENCOs, meeting chairs, families, young people and professionals. The most helpful reviews are clear, evidence-based and focused on what has changed, what is working, what is not working, and whether the EHCP needs to stay the same, be amended, be ceased or whether reassessment may be needed.

1. Before you start

- Use the current EHCP, previous review paperwork, progress information and any recent professional advice to support the discussion.
- Gather child or young person views, parent/carer views and professional updates before the meeting wherever possible.
- Do not duplicate information. If evidence is attached or recorded elsewhere, briefly reference it rather than rewriting it in full.
- Use “No change”, “Not applicable” or “Not known” where appropriate, so it is clear that the section has been considered.
- Make sure the completed review paperwork is submitted to the local authority within two weeks of the review meeting.

2. What makes a strong annual review?

Good practice	Try to avoid
Explain progress against each EHCP outcome, using examples or evidence where available.	Only saying “making progress” without explaining what the child or young person can now do.
Record whether Section F provision has been delivered as written and whether it is still needed.	Focusing only on requests for more support without reviewing current provision and impact.
Be clear about any recommended changes to the EHCP and why they are needed.	Making broad amendment requests without linking them to evidence, need, progress or impact.

3. Section-by-section guidance

3.1 Child or young person information

Complete the basic details accurately, including the date of the review meeting, review type and whether views, advice and information were gathered before the meeting. This section also helps check whether the review process has met expected timescales.

Example completed extract from Section 2: Child/Young Person Information	
Child or young person views gathered before the meeting	Yes – views gathered on 6 July 2026 through a supported conversation with a trusted teaching assistant.
Parent/carer views gathered before the meeting	Yes – received by email on 8 July 2026.
Professional updates requested before the meeting	Yes – updated school information and speech and language therapy advice requested.
Advice and information circulated at least two weeks before the meeting	Yes – circulated on 10 July 2026.

3.2 Review meeting record

List who was invited, who attended and whether reports were submitted. If someone important could not attend or did not provide advice, record what steps were taken to gather their views and whether anything still needs to follow.

Example completed extract from Section 3: Review meeting record				
Name	**Job role / organisation**	**Invited?**	**Attended?**	**If unable to attend, was a report submitted?**
J Patel	Speech and language therapist	Yes	No	Yes – report dated March 2026 considered. SENCO to request clarification about whether current communication targets remain appropriate.

3.3 Views and what matters now

This section should reflect the child or young person's views, the family's views and the key points from the meeting. Views can be gathered in different ways, including conversation, drawing, observation, communication aids or support from someone who knows the child or young person well.

Example completed extract from Section 4: Views and what matters now	
How were views gathered?	☒ Direct conversation ☐ Drawing ☐ Written views ☐ Observation ☐ Communication aid ☐ Other
Child or young person: What is going well for you with your learning?	Maya says she enjoys art and works best in a quiet space where she knows what will happen next.
Child or young person: What is difficult or needs to change?	The lunch hall is too noisy and unexpected changes make it difficult for her to return to learning.

Parent/carer: What is going well?	Attendance has improved since the school introduced a key-adult check-in.
Parent/carer: What is not working or causing concern?	Morning routines remain difficult, particularly when there is a change to the usual plan.

3.4 Progress, provision and impact

Use one row for each EHCP outcome. Briefly record progress, what the child or young person can now do, whether Section F provision has been delivered as written, and whether the outcome should be kept, stopped or amended.

Example completed extract from Section 5: Progress, provision and impact				
EHCP outcome	**Progress position**	**Was Section F provision delivered as written?**	**What can the child or young person now do?**	**Keep outcome?**
Sam will follow two-step classroom instructions with reduced adult prompting so he increases his independent learning skills	☐ Achieved ☐ Good progress ☒ Some progress ☐ Limited progress ☐ No longer appropriate	☒ Yes ☐ Partly ☐ No	Sam can follow two-step instructions when supported by visuals and when the instruction is repeated once. Classroom observations show this in four out of five familiar tasks.	☒ Yes ☐ No ☐ Amend

3.5 Anything impacting access to learning?

Use this section to summarise any current barriers affecting access to learning, school life or progress. This may include attendance, wellbeing, health, changes at home, friendships, transitions, routines, confidence or safety. Keep the focus on impact and what may help.

Example completed extract from Section 6: Current barriers to learning
Since moving class, Theo has found transitions more difficult and often needs adult support to enter the classroom after break. A visual timetable and planned transition support have reduced the impact, but unexpected changes still result in missed learning. Advance warning, visual prompts and a familiar adult at transition points help him re-engage.

3.6 Health

The meeting chair should ask whether there have been any changes to health needs, health provision or wider health circumstances. Complete this section even where there are no changes, so it is clear health was considered.

Example completed extract from Section 7: Health		
Health check-in question	**Response**	**Brief details / next step**

Have there been any changes to health needs or circumstances?	☐ Yes ☒ No	No changes reported.
Is further health information or advice needed?	☐ Yes ☒ No	No further advice needed.
Do health needs or provision in the EHCP need updating?	☐ Yes ☒ No changes needed ☐ Not applicable	Current health information remains appropriate.
If there are no changes	☒ Health was discussed and no EHCP changes are needed.	

3.7 Social care

The meeting chair should ask whether there have been any changes to social care needs, family circumstances, support at home or care provision. Complete this section even where there are no changes, so it is clear social care was considered.

Example completed extract from Section 8: Social care		
Social care check-in question	**Response**	**Brief details / next step**
Have there been changes to social care needs, family circumstances or support at home?	☒ Yes ☐ No	The child is now supported under a Child in Need plan. The plan identifies support for the child and family, including coordinated work between social care, education and other involved services.
Is further social care information or advice needed?	☒ Yes ☐ No	An updated social care contribution and relevant information from the Child in Need plan should be obtained from the allocated social worker to inform any EHCP amendments.
Do social care needs or provision in the EHCP need updating?	☒ Yes ☐ No changes needed ☐ Not applicable	Sections D and H2 should be reviewed and updated, where appropriate, to reflect the child's current social care needs and any provision arising from the Child in Need plan.
If there are no changes	☐ Social care was discussed and no EHCP changes are needed.	

3.8 Preparation for adulthood

From Year 9 onwards, annual reviews should consider preparation for adulthood. This includes employment or training, independent living, community inclusion, relationships, health and travel where relevant. Keep the discussion age-appropriate and focused on next steps.

Example completed extract from Section 9: Preparation for adulthood		
Area discussed	**Response**	**Further details**
Employment or training discussed?	☒ Yes ☐ No ☐ Not applicable	Aisha would like to explore animal care courses. SENCO to arrange supported visits to two local college options.

Independent travel or post-16 travel assistance discussed?	☒ Yes ☐ No ☐ Not applicable	Aisha is not yet confident using public transport independently. Travel training will be explored and safety skills reviewed before transition.
Are preparation for adulthood outcomes, provision or other EHCP amendments needed?	Yes – Aisha will develop the knowledge and understanding of her post-16 education and training options so that she can make an informed decision about what she would like to do next.	

3.9 Personal Budget

Record whether there is an existing Personal Budget, whether one has been requested, or whether the parent or young person wants to discuss a new or changed Personal Budget. If this is not relevant, mark this clearly.

Example completed extract from Section 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	Not applicable. Parent would like information about the process if provision changes in future.

3.10 Recommendation to the local authority

Choose the recommendation that best reflects the review discussion and evidence. The reason should be brief but clear enough for the local authority to understand why the recommendation is being made.

Example completed extract from Section 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**	The child has made progress with current provision, but new evidence shows that the communication outcome and related provision need updating so that support remains specific, measurable and matched to current need.

3.11 Proposed EHCP changes

Complete this section if changes are being requested, or to confirm that no significant changes are needed. If a tracked draft amended EHCP is attached, you do not need to list every wording change, but you should still record the EHCP section, the type of change and why it is needed.

Example completed extract from Section 12: Proposed EHCP changes				
EHCP section	**Type of change**	**Summary of change**	**Why is this needed?**	**Tracked draft attached?**
Section F	☐ Add ☒ Amend ☐ Remove	Replace general classroom support with daily adult support in English and maths, twice-weekly skills sessions, pre-teaching and visual instructions, with weekly SENCO review.	Current support is insufficient. Evidence shows the young person needs sustained adult direction to understand and begin multi-step work, resulting in lost learning and incomplete work.	☒ Yes ☐ No

3.12 Evidence supporting any recommendations

Use this checklist to show what evidence has been considered, attached or is still to follow. Evidence should support the recommendation and any proposed amendments. If something is missing, say what it is and when it may be available.

Example completed extract from Section 13: Evidence supporting 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
Anything missing or still to follow?	Updated occupational therapy advice has been requested and will be forwarded when received.

3.13 Optional follow-up actions from the review meeting

Only complete this section where specific follow-up actions were agreed during the meeting. Do not include routine actions unless there is a specific issue, delay or follow-up needed.

Example completed extract from Section 14: Optional follow-up actions			
Follow-up action	**Why this is needed**	**Who is responsible?**	**By when?**
Request updated occupational therapy advice and share the recent clinic letter.	Handwriting fatigue is affecting access to written tasks and current advice may no longer reflect need.	SENCO to request advice; parent to provide clinic letter.	Within ten school days of the review meeting.

3.14 Final compliance, quality check and sign-off

Use this checklist before submitting the review. It should confirm that the review is complete, views have been captured, relevant advice has been considered, progress and provision have been reviewed, and the recommendation is clear and evidence-based.

3.15 Sign-off and submission details

Complete the sign-off details so it is clear who completed the review, when the meeting was held, when the paperwork was submitted to the local authority, and when it was shared with the parent/carer and child or young person where appropriate.

Example completed extract from Section 16: Sign-off and submission details	
Sign-off detail	**Response / details**
Review completed by	J Smith
Role	SENCO
Date review held	10 July 2026
Date submitted to local authority	18 July 2026
Date shared with parent/carer	18 July 2026
Date shared with child or young person, where appropriate	18 July 2026, using an accessible summary.

4. What happens next?

- The completed review paperwork and supporting evidence will be considered by the local authority.
- The local authority will decide whether the EHCP should be maintained, amended, ceased, or whether reassessment is needed.
- If amendments are considered necessary, an amended EHCP will usually be issued as part of the statutory amendment process.
- If the current EHCP remains appropriate, it may stay in place and the annual review paperwork will record the discussion, progress and any updated information.
- If evidence is still to follow, it should be provided as soon as possible so it can be considered before the decision is made or finalised.

5. Helpful sentence starters

- “Since the last annual review, the child or young person has made progress with…”
- “The support that appears to have had the most impact is…”
- “The child or young person can now…”
- “The current outcome remains appropriate because…”
- “The current outcome needs to be amended because…”
- “Section F provision has been delivered as written / partly delivered / not delivered because…”
- “The main barrier to learning at the moment is…”
- “No significant EHCP amendments are requested because…”

- “The recommended change is needed because the evidence shows…”

6. Plain English glossary

Word or phrase	What it means
Annual review	A yearly review of an EHCP to check progress, provision, views and whether the plan needs to change.
EHCP	An Education, Health and Care Plan. This is a legal document that sets out needs, outcomes and special educational provision.
Outcome	Something the child or young person is working towards over time, usually linked to their needs and aspirations.
Section F	The part of the EHCP that sets out the special educational provision that must be made.
Amend	To make changes to the EHCP.
Cease	To bring the EHCP to an end because it is no longer considered necessary.
Reassessment	A new assessment process to understand current needs, provision and outcomes when the existing information may no longer be enough.
Preparation for adulthood	Planning from Year 9 onwards for employment, independence, community inclusion, relationships and health.