



EHC Plan Annual Review Guidance for SENCO's

September 2026

Preparing for the EHC Plan Annual Review Meeting

Preparation for the Annual Review meeting can start at any time that fits in with the school calendar. The LA SEN Team will send a list to the setting each term of the children or young people with EHC plans who are due a review. It will be your responsibility to arrange the meetings in a timely manner.

Please note that the annual review process for a Phase Transfer (moving from one educational stage up to the next) should allow plenty of time for planning and consideration of new provisions.

All Phase Transfer Annual Review meetings should take place in the Autumn Term.

Year Group	Timeframe for Phase Transfer Annual Reviews
Nursery/Pre-school moving up to Reception.	Nursery/Pre-school Annual Review 2 meeting to be held in the first half of the Autumn Term. <u>All Annual Review Paperwork to be submitted to the SEN Team by 23rd October 2026.</u>
Year 2 moving into Year 3.	Year 2 Annual Review meeting to be held in the first half of the Autumn Term. <u>All Annual Review Paperwork to be submitted to the SEN Team by 23rd October 2026.</u> This early review requirement applies only to pupils attending infant schools, to support transition to junior school. For pupils attending primary or all-through schools, Annual Reviews should take place at their usual point in the review cycle. Any amendments identified through the review will still be processed by the Local Authority in the normal way.
Year 6 moving into Year 7.	Year 6 Annual Review meeting to be held in the first half of the Autumn Term. <u>All Annual Review Paperwork to be submitted to the SEN Team by 23rd October 2026.</u>
Year 11 moving to Post 16.	Year 11 Annual Review meeting to be held in the Autumn Term. <u>All Annual Review Paperwork to be submitted to the SEN Team by 18th November 2026.</u>
Year 13 moving to Post 19.	Year 13 Annual Review meeting to be held in the Autumn Term. <u>All Annual Review Paperwork to be submitted to the SEN Team by 27th November 2026.</u>

If you are recommending an increase or change to a child or young person's current provision (or a specialised placement) as part of the Annual Review process, you must provide additional detailed evidence to demonstrate why these changes are required.

We begin our discussions & consultations for specialised placements from October.
Please ensure specialised placement requests are submitted to the EHC Team by the End of September 2025.

Before the Annual Review Meeting
(Advised 4-6 weeks before)

Checklist	
Send meeting invitations to family and relevant professionals (a minimum of 2 weeks before)	
Notify LA SEN Team of meeting date (a minimum of 2 weeks before)	
Request a copy of any reports completed by professionals within the last 12 months (be aware that this process can take several weeks)	
Request written contributions from Parent/Carers	
Complete Child or Young Person's Views	
Complete Preparing for Adulthood Form (for all young people from Year 9)	
Complete The SENCO Report (share with all attendees and the LA SEN Team a minimum of 2 weeks before)	

The Annual Review Meeting

The Annual Review meeting must enable full involvement of the parent/carer, child or young person and consider their views, wishes and feelings especially when making decisions. **It is important to check all sections of the EHCP not just the educational targets and provision.** This provides an opportunity for parents/carers and CYP to request changes and updates. It may also be that what you expected to happen, based on your understanding/interpretation of various elements of the EHCP has not been delivered exactly as you had anticipated.

The Annual Review meeting must focus on progress made towards achieving outcomes and establish whether the current outcomes remain appropriate. If it is required, new outcomes should be agreed. You must review the special educational provision, how it is delivered and ensure it is still appropriate to enable good progress. It is important to review any health and social care provision. The family, child or young person's aspirations should be central and a discussion should focus on whether these have changed. You must check if the family, child or young person would like to request a Personal Budget.

The meeting should focus on future planning and not just on how things have gone in the past year. Person Centred Planning Practice recommends that the voice of the child should be considered first in the meeting. Other aspects of the meeting can then be discussed within the context of the child's wishes. All present at the meeting, especially the child, young person and parents/carers should be given the opportunity to express their views about all aspects of the review.

All proposed amendments should be completed on a word version EHC plan (typed, using strikethrough & coloured text where applicable so this can be read and interpreted easily by our SEN Caseworkers).

Following the Annual Review Meeting

No later than 2 weeks after the meeting please send the following completed documentation to the LA SEN Team

Checklist	
EHC Annual Review Report	
All proposed amendments on a word version EHC plan	
A copy of the child or young person's most recent attainment data	
A copy of the child or young person's attendance data	
Any reports completed by professionals within the last 12 months	
Parent/Carer Views	
Child or Young Person's Views	
Preparing for Adulthood Form (for all young people from Year 9)	
Walsall SEN Support Plan / Provision Map to support any recommendation for an increase/change to current provision.	

Early or Interim Annual Reviews

An early or interim Annual Review may be appropriate where the education, health or social care provision specified in the EHCP is no longer meeting the child or young person's needs.

This may include, for example, where a child or young person has been excluded from school or is at risk of exclusion.

As these reviews fall outside the normal Annual Review cycle, schools and settings must contact the LA SEN Team before arranging the review. The Local Authority will consider the circumstances and confirm whether an early review is appropriate.

Where an early review is agreed, the statutory Annual Review process must be followed, and all documentation and supporting evidence must be submitted in line with this guidance.

Please email all Annual Review documentation to:

SEN@walsall.gov.uk

The SENCO report should be completed before the Annual Review. This report gives the family an update of provision and outcomes and supports better preparation for the meeting. You may want to change the format or look of this form. We would ask that the current headings remain the same although you can add anything to make it more appropriate to your individual setting.

SENCO Report

CYP Name:	Year group:
Setting:	Name of SENCO:
Summary of identified Special Educational Needs	
Summary of provision that is in place in school (attach current SEN Support Plan/Provision Map)	
Key support strategies that have helped	
Summary of progress that has been made this year	
• What progress has been made towards the EHCP outcomes? • What evidence demonstrates this progress? • Are the current outcomes still appropriate? • What changes, if any, do you recommend to the outcomes or provision?	
Things that are working well, including special recognitions and achievements	
Things that could be better	
Friendships, relationships and social development	
What we are planning to do now, next and later	
SENCO Signature:	Date:

The Parents/Carer form should be completed before the review meeting and circulated with any additional information at least 2 weeks before. We advise it is completed 4-6 weeks before to allow for better preparation. You can add additional headings or collect this information in any way which supports the family.

Parent/Carer Views

CYP Name:	Parent/Carer Name:
Setting:	Name of SENCO:
Achievements and Strengths What are your child's strengths? What do you think is working well at home and at school? What achievements has your child been most proud of during the past 12 months?	
Concerns and Worries Do you have any current concerns? What do you think is not working well? What could be better?	
Friendships and Relationships Tell us about your child's relationship with their peers and the adults who support them...	
Learning and Educational Progress Is your child making progress in their learning? How successful has the EHC plan been this year? Are the EHC outcomes appropriate? Has the provision in place helped?	
Health and Wellbeing Has there been any changes to your child's health, wellbeing or special educational needs over the past 12 months? Are there any unmet health or social needs that should be supported?	
Aspirations and Goals What are your future aspirations for your child? What would you like to see happen in the next 12 months?	
Important information to know Anything else you would like to tell us?	

Child or Young Person's Views

The Child or Young Person's Views can be submitted in whatever format best suits the individual. You may want to consider alternatives to writing such as mood boards, paintings or photographs. We can accept power point presentations, videos or any other media platform. **This is a fully open section of the Annual Review process.** Views should be gathered before the review meeting and circulated with any additional information at least 2 weeks before. However, we advise they are completed at least 4-6 weeks before the meeting to allow for better preparation.

The following conversation starters may be useful:

What things have you enjoyed doing most this year?

What activities did you do well in?

Who or what helps you in school?

What has gone well for you this year?

What are you pleased about?

What has made a difference to your family?

What is your proudest moment?

What are your aspirations?

What is important to you?

What would you like to do more of?

Is there anything you are concerned about?

What has been a challenge you this year?

What do you feel needs to change?

What would you like to do outside of school?

What would you like to do in the future?

What job would you like?

Where would you like to live?

What might you need help with to do this?

What have you not enjoyed doing this year?

What have you found hard this year?

What could make things easier?

What do you currently do with your friends and what would you like to do?

Is there anything you are worried about?

What do you do outside of school and what would you like to do? Do you need help with this?

Are you happy with your friends? Do you find making friends difficult? Would you like more help with this?

Preparing for Adulthood

Preparing for Adulthood (PfA) is not a single transition point. It's a continuous journey that should begin early and unfold over time, through relationships, everyday experiences, choices and growing confidence. Every young person's path will be different, and that's exactly as it should be.

In line with the SEND Code of Practice (2015, Section 8.9), all Annual Reviews from Year 9 must include a focus on preparing the young person for adulthood. Planning must be centred on the young person's aspirations and abilities. What they want to be able to do when they leave further education and how they can be supported.

Young people should have the information they need to move onto the next stage of their lives. Some young people will move to employment or higher education, or to on-going health/adult services including adult learning opportunities.

Schools and colleges should raise the career aspirations of their students with SEN and broaden their employment horizons. They should ensure that students are provided with independent careers guidance and use taster opportunities, work experience, mentoring, role models and inspiring speakers to assist young people to make informed decisions.

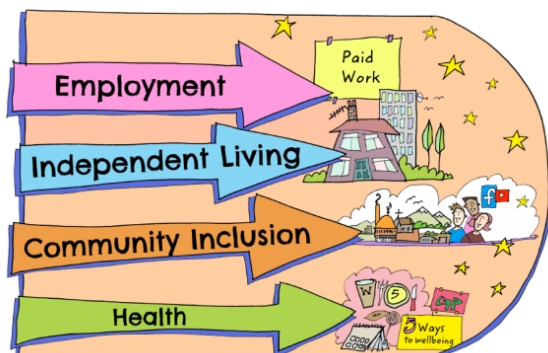
Independent Travel Training is available for Year 9 pupils. If a CYP would like support with independent travel training, please contact the SEN Team. When doing so please identify any factors that may support engagement, along with any barriers that could impact the child or young person's ability to access or participate in the programme.

The resource below outlines examples of aspirations, activities and provision that can support progress towards Preparing for Adulthood (PfA) outcomes across different ages and stages of development. It is not an exhaustive list but is intended as a helpful starting point for planning and discussion.



[PfA-Outcomes-Framework.pdf](#)

[Preparing for Adulthood: All Tools & Resources - NDTi](#)



The Preparing for Adulthood form should be completed before the review meeting by young people in Year 9 and above. We advise it is completed 4-6 weeks before to allow for better preparation. You can add additional headings or collect this information in any way which supports the young person.

Preparing for Adulthood

CYP Name:	Year Group:
Setting:	Name of SENCO:
Things I like to do	
In my spare time:	At school or college:
Important people in my life	
Things that are going well	Things I would like to change
What is important for my future? My goals and aspirations	
Education and Employment: <i>What am I aiming for in terms of college or training? Do I have an idea about which course or setting I would like to attend? What kind of work or career might suit me? What do I need to do to achieve this?</i>	
Independent Living: <i>What am I thinking about where I would like to live as an adult? What help might I need to achieve this? What can I do for myself at the moment and what skills do I still need to learn?</i>	
Maintaining Good health: <i>What am I hoping for in terms of my health? (arranging/ attending appointments, medication, diet and exercise, safe relationships etc.)</i>	
Friends, Relationships and Engaging in the Community: <i>What kind of life would I like as an adult with my friends? How can I connect with my local community? What help and support may I need to understand and build safe relationships?</i>	
How best to support me	
The best way to support me with communication, learning, making my own decisions and becoming independent.	



EHC Annual Review Report

Family Name		First Names	
Home Address		Date of Birth	
		Telephone	
		Email	
Educational Setting		Year Group	SENCO
Gender	First Language	Ethnicity	NHS Number
GP Contact Details			CAF / EHA /CIN
Persons with Parental Responsibility	Relationship		Contact Details <i>if different</i>
Best Person to Contact <i>family member</i>		Name and Method of Contact	
LAC Yes ☐ No ☐		Social Worker <i>name and contact</i>	
If YES, which authority is responsible for this child / young person? /Contact details			
Details of any interpretation/access support needed for the family.			
Date of Last review meeting:			Date of current review meeting:
Persons who attended the review meeting			
Name	Designation/Role		Invited

In line with the SEND Code of Practice 2015 and the child's / young person's progress, does the Education, Health and Care Plan need to be:

Maintained	Ceased	Amended
There are no changes required to the plan at this time. It is not anticipated that every review will require amendments to be made to the EHC plan.	The identified outcomes have been met and the child/young person's needs can be met from the SEND support arrangements within the setting.	The plan requires some changes. (Any changes should have been proposed and communicated a minimum of 2 weeks before meeting).

Was everyone at the meeting in agreement? Please list any areas which were not agreed during the meeting.

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Please list any actions or tasks agreed during the meeting. Only assign tasks with agreement of person responsible.

Task or action required	Person responsible for completing action	Date action will be completed by

Preparing for Transfer between Phases of Education

Transition Year Group	Preferred Type of Setting	Parent/Carer Comments
EYFS to KS1		
KS1 to KS2 (If applicable due to separate settings) <i>To be compiled for Yr. 1 pupils</i>		
KS2 to KS3 <i>To be compiled for Yr. 4 pupils</i>		
Post 16 education, employment or training. <i>To be compiled for Yr. 10 pupils</i>		

**Children and young people with special educational needs and disabilities needs may be eligible for help with transport to the school or college which is the most appropriate for their needs. Where an alternative school is parental preference and may not be the most local school to the home address, transport may not be provided. Please refer to Home to school transport / Walsall Council for the most up to date transport policy and information.*

Details of the person completing this form

Name	Role
Name of setting	
Email	
Signature	Date

What happens next?

Following an Annual Review meeting where changes to an EHC plan are proposed, the Local Authority will consider the recommendations and review the submitted documentation. Within **4 weeks of the Annual Review meeting**, the Local Authority will notify parents/carers (or the young person) of its decision to **maintain, amend, or cease** the EHC plan. If the decision is to amend the plan, the Local Authority will issue an **amendment notice**, followed by a **draft amended EHC plan**, typically issued within 8 weeks of the Annual Review meeting. Parents/carers (or the young person) will have **15 days** to make comments or request further changes. The Local Authority must then issue the **final amended EHC plan within 8 weeks of issuing the draft**.

Ceasing a plan

For plans that are proposed to cease (as the support is no longer required by the child or young person and not because of relocation), the school will need to submit the EHC Annual Review Report no later than 2 weeks after the meeting. This will then be processed by the LA SEN Team and the proposal to cease looked at by a centrally based decision-making group. If proposal to cease is agreed, the Local Authority will issue a notice to parent/carers or young person in line with Code of Practice.

Please email all Annual Review documentation to:

SEN@walsall.gov.uk