**Annual review: EHC Plan (or Statement)**

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| **PART 1: General information** | |
| **Surname:** | **National curriculum year:** |
| **Forename(s):** | **Home language:** |
| **Date of birth:** | **Parents’ or carers’ names:** |
| **Address:** | **Address (if different from left):** |
| **Date of original statement:** Click here to enter a date. | **Date of EHC Plan or statement review meeting:** Click here to enter a date. |
| **Attendance this academic year:** | **Date of previous review:** Click here to enter a date. |
| **Name of school or setting:** | |
| **PPG:** ☐ **CIN:** ☐ **CP:** ☐ **LAC:** ☐ | |

*For more details of annual review please refer to chapter 7 in the Golden Binder where the different types of review and guidance is given in more detail, including how to complete this form.*

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| **Annual Review Meeting Type** | **Select** | **Forms needed** |
| Annual review of EHC Plan (or Statement) | ☐ | * **AR1** This annual review form |
| 6 monthly review for children in Early Years settings | ☐ | * **AR1** This annual review form |
| Annual review of EHC Plan in year 9 or 10  *(preparing for adulthood categories must be discussed from year 9 and applied from year 10* | ☐ | * **AR1** This annual review form * **EHC-PFA** EHCP Additional PFA (preparing for adulthood) sections |
| Annual review for a child planning a phase transfer (e.g. from primary to secondary school).  *This happens normally in nursery (to reception) / year 1 (infant to junior) / year 5 (primary to secondary) / year 10, 12, 13 or 14 (secondary to 6th form / college / other post 16 provision)* | ☐ | * **AR1** This annual review form |
| Annual review statement and start of transfer to EHCP *(usually at end of school year prior to 1, 5 or 9)* | ☐ | * **AR1** This annual review form * **TR1** Additional pre-transfer checklist * **EHC1** Copy of blank EHCP Form * **EHC-A1** or **EHC-A2** Copy of blank Section A (either version) |

**PART 2: Review Attendees**

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| **Name** | **Designation or role** | **Invited** | **Attended** | **Report attached** | **Report received before meeting** |
|  |  | ☐ | ☐ | ☐ | ☐ |
|  |  | ☐ | ☐ | ☐ | ☐ |
|  |  | ☐ | ☐ | ☐ | ☐ |
|  |  | ☐ | ☐ | ☐ | ☐ |
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|  |  | ☐ | ☐ | ☐ | ☐ |
|  |  | ☐ | ☐ | ☐ | ☐ |

**PART 3: Summary of this Year**

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| **Views of the School or Setting (Early Years / College)** | Check here if report from setting appended instead |  |
|  | | |
| **Pupil’s views**  (Can be pictorial or however best they communicate or interact) | Check here if report from pupil appended instead |  |
|  | | |
| **Parent’s views** | Check here if report from parent appended instead |  |
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**Progress this year**

**Key:**

**1**- Regression **2**- No progress **3**-Some progress **4**-Expected progress **5**-better than expected **N/R**-No longer relevant

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| **Current Outcomes (from existing EHCP)** | **Rating of Progress** | | | | | | **Document revised outcome** |
| **1** | **2** | **3** | **4** | **5** | **N/R** |
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| **What has contributed to the above progress ratings? *(reference relevant evidence which should be in appended documents or in the “School View” section above):*** |
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**PART 4: Changes required to plan (or Statement)**

*Note: the main points at which changes will be expected to an EHCP will be in years 5, 9/10 and 11. In between these times small changes can be recorded in the annual review form (which becomes part of the paperwork). However if during an annual review it is agreed that changes in outcomes, needs or provision are needed these will need to be changed in the plan and the plan reissued.*

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| **Changes to Aspirations or Updates to “All about me” (Section A)** |
|  |
| **Changes to Needs, Provision & Ouctomes (no longer relevant /add new or change existing )** |
| Changes in Needs (either to delete as no longer relevant / add new or change existing) |
| Changes in Provision:(either to delete as no longer relevant / add new or change existing) |
| Changes in Outcomes (either to delete as no longer relevant / add new or change existing) |

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| **Change in placement discussed?**  If the change in needs or provision give rise to a need for a change in placement please describe this here (this could be a complete change or a difference in balance for a split placement)  If the child is approaching a phase transfer (e.g. primary to secondary) discussions may also be documented here |
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**Note:** If specifying increased provision the educational setting must:

1. Identify additional needs that give rise to the need for additional provision
2. Append to this annual review a provision map, specifying resource currently used and how additional resource will be used. This can be in any format but there is a template that can be used in the Golden Binder in Appendix …….

**PART 5: Other actions discussed at the review to support the child or young person**

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| **Agreed Action** | **By when** | **Who** | **Outcome** |
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| **Any other comments from Annual Review meeting** |
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**PART 6: Educational Transport**

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| **Does the child or young person use local authority transport for their journey to school?** |
| ☐ Yes  ☐ No |
| If yes, why do they require transport? |
|  |
| **Does the child or young person travel with a passenger assistant (escort)?** |
| ☐ Yes  ☐ No |
| **Is your child able to travel with a higher level of independence, without the passenger assistant?** |
| ☐ Yes  ☐ No |
| Many children use SEN Transport for the first time in primary school. As your child gets older you will wish to develop their independence as they prepare for adult life, whether it’s some form of independent living, a college course, apprenticeship or employment. It will be crucial for their independence and their employability that they are able to travel independently, especially when going to work. It will also aid them in visiting friends and the wider community.    We now have a voluntary, fully funded and free Independent Travel Training scheme for those children and young people who would benefit from it. |
| **Is your child is ready for independent travel training? If you answered no, please detail why not:** |
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| This will help us in developing our Independent Travel Training Programme |

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| **Checklist for Annual Review Meeting** | yes | no |
| Have the views of the parent and child or young person been heard and documented?  Has progress for the year against outcomes defined in the plan been documented and evidenced?  Have current needs and provision been discussed?  Are changes to outcomes, needs or provision being requested as a result of this review?  Has any change to placement been discussed (either due to change in needs or phase transfer)?  Has the preparing for adulthood section been discussed (**EHC-PFA**) for young people in year 9+  Has a personal budget been requested?  Has SEN transport been discussed?  Has short breaks provision been discussed?  Has the child or young person been given the evaluation questionnaire? (in Golden Binder or on-line version on Local Offer)  Should the local authority continue to maintain the plan? | ☐  ☐  ☐  ☐  ☐  ☐  ☐  ☐  ☐  ☐  ☐ | ☐  ☐  ☐  ☐  ☐  ☐  ☐  ☐  ☐  ☐  ☐ |
| **Documents to Append when submitting this Annual Review Report** | | |
| Copies of all reports submitted as part of the annual review    Annotated version (track changes) copy of the current EHCP form (if changes requested)    Provision map if changes to provision requested  Minutes of the meeting (if separate from this document)  Reports that will be provided following the meeting \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | ☐  ☐  ☐  ☐  ☐ | |

**PART 7: Final Checklist and Sign off**

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| **Lead professional:** |  |  |
| **Parent’s or carer’s signature:** |  | **Date:** |
| **Headteachers’ signature** |  | **Date:** |