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**Additional Checklist and Documentation for Annual Review prior to Transfer to EHCP**

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| --- | --- | --- |
| **Additional Checklist** | Yes | No |
| Has the parent or young person been given a copy of the section A form ?  Have outcomes for the child or young person been discussed and preliminary outcomes identified?  Have the needs and provision as defined in the statement been reviewed and gaps and changes required been identified and documented?  Has any additional professional advice required been identified and documented on this form?  Does the statement need to be reissued with the proposed changes? (Otherwise the information will be included in any future EHCP)  Has the family or young person had the transfer process (and what will happen next) explained to them? |  |  |
| **Documents to append when submitting the annual review report** | | |
| EHCP template with draft outcomes and any other comments in draft  This form |  | |

**List of additional and updated professional advice to be requested as input to EHCP**

|  |  |  |  |
| --- | --- | --- | --- |
| **Professional to request advice from** | **Area**  **(OT, Ed Psych, Medical** | **Rationale for requesting updated advice** | **Who will progress (School, family, SEN team)** |
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