

Guidance for completing the Annual Review Form for EHCPs

This guidance is to support the completion of the [Annual Review Form for EHCPs](#) which is the formal record of a pupil's progress over the previous year. It may be used to inform an amendment of an EHC plan; support a request for change of placement or additional level of support; or, in some circumstances, be submitted as evidence towards a SEND tribunal. As such, the form must be completed thoroughly and accurately.

This guidance forms part of the Annual Review paperwork for pupils with an EPC plans and should be read in conjunction with [Essex Annual Reviews for EHCPs: Guidance notes for educational settings](#)

Summary Box

Please provide details of the date of the current EHC plan, and the date that this review is being held.

Section 1

1a and 1b	The basic details for the pupil including personal details and school placement.
1c	A list of all those involved with the pupil at the time of the annual review (all listed should be invited to the annual review meeting). It is essential that this section is completed in full, including indication of who was present at the meeting as this is the formal record of this meeting.
1d	Details of the Plan Co-ordinator/ SENCO, who has responsibility for co-ordinating the annual review process.
1e	All reports gathered during the previous year, which have been used in support of the current annual review, should be listed. Copies of these reports should be provided with the completed annual review paperwork. Add the list of documents that have been used to inform the annual review.

Section 2

This section provides the opportunity for the young person to consider their overall progress since the last annual review and should be completed thoroughly, with examples and supporting evidence where appropriate. Entries within this section could be supported by views or observations from those involved with the young person, and it should be made clear who has provided comments towards this section. Supporting documents such as a One Page Profile can be added. Details of who has supported the pupil to gather their views.

Section 3

3a	Opportunity to review progress made against each outcome of the EHC plan. Space is provided for the views of the pupil, the parent(s)/carer(s), the educational/training setting and other professionals for each outcome. Both positive progress and remaining areas of improvement should be addressed. The support provided in order to meet each outcome should also be detailed – this will be particularly important for any requests for additional support.
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3b	<p>Details of any additional factors influencing progress should be provided here. This may include examples such as:</p> <p>School: “Jack is a valued member of the school football team. However, he has a difficult relationship with a fellow teammate, which is sometimes transferred to the classroom”</p> <p>Home: “An extension is currently being built on the family home, causing disruption for the whole family. Building work has affected daily routines, which Elena struggles to cope with.” Details of support provided outside of school should also be provided here.</p>
Section 4	
4a	<p>The Profile of Need should be completed in order to provide a summary of the current level of need. Indicate the areas where the pupil has needs requiring an EHC plan.</p> <p>The pupil’s primary area of need must also be provided. This must be the area of need officially recorded by the local authority (LA) for which the pupil was issued an EHC plan, and should not be a reflection of the area of need as viewed by the school. Any recommendations to alter the primary area of need must be submitted to the LA as part of the annual review process.</p>
4b	<p>The grid does not have to be used but an indication of the pupil’s attainment must be provided. Attainment for all previous academic years should be included to provide a picture of progress over time where this is appropriate.</p>
Section 5	
5a	<p>If it is recommended that changes to existing outcomes (or the addition of new outcomes) should be made, these should be detailed here alongside recommendations of the support that will be required in order to achieve these outcomes.</p>
5b	<p>Details of any Personal Budget received should be reviewed during the annual review, with outcomes indicated on the paperwork.</p>
5c	<p>Consideration should be given each year to appropriateness of the existing placement. For pupils approaching transfer (junior or secondary transfer, or progression into college or training), an indication as to the preferred future placement should be provided.</p>
5d	<p>A summary of the review recommendations, as agreed by those present. Please provide a percentage for the number of outcomes that the pupil is making progress towards reaching. This does not mean that the outcome must be fully achieved but that there is evidence that progress towards the outcomes has been made.</p>
5e	<p>Any differing views, or additional comments raised during the annual review meeting, should be recorded.</p>
After the annual review	
<p>All annual review paperwork (including supporting documentation) must be submitted to the Local Authority no later than 10 days after the meeting. The Local Authority will then respond to the review accordingly, and is required to do so within two weeks.</p>	