

**7 STEPS - Annual Review Process**

**Code of Practice, Annual Reviews, 9.166-9.210**

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| ANNUAL REVIEW TIMETABLE | ACTION | WHO |
| **Step 1** **PLAN AHEAD**within ***12 months*** of EHCP, at the beginning of every school term (Autumn, Spring, Summer), book a date/time/location for AR (school/virtual) and obtain advice and information about the CYP from all the relevant professionals and the parent and the CYP themselves.  | Focus on child’s progress on achieving EHCP outcomesReview appropriateness of targets/outcomes at the meeting and going forward | SENCO and SEND officer are to lead on planning ahead the dates/times for each term and invite all professionals/parents/CYP SEND officer to Inform CCG/health partners of the Annual reviews to occur in that term  |
| **Step 2 SHARE UPDATES/REPORTS**at least ***2 weeks*** before AR meeting, circulate reports received along with the reminder to attend AR meeting.  | Circulate information  | Lead professional/host of the AR meeting (often delegated to school SENCO). |
| **Step 3 PARTNERSHIP-COMMUNICATION**AR meeting will consider: * CYP’s progress towards achieving the outcomes specified in their EHC plan
* Outcomes are appropriate
* Changes in aspirations
* Review and set new short-term targets
* Make any changes to the provision including if the placement is still appropriate
* Evidence changes in reviewed EHC plan
 | Ensure partnership and information sharing with all and evidence CYP/parents’ involvementPerson centred planning mtg MUST COVER BELOW POINTS:* focus on progress made towards achieving outcomes
* establish whether the current outcomes remain appropriate and if required agree new ones
* review the short-term targets and set new ones
* review the special educational provision and the arrangements for delivering it to ensure it is still appropriate and enabling good progress
* review any health and social care provision and check its effectiveness towards achieving the outcomes
* check if the aspirations have changed (consider them in the context of paid employment, independent living and community participation (CoP 9.69)
* check if the parent/YP would like to request a Personal Budget.
 | Lead professional/host of the AR meeting (often delegated to school SENCO). |
| **Step 4 FOLLOW THROUGH TIMELY****Within *2 weeks* of AR MEETING** School or Setting (or host) must prepare a report that includes recommendations for amendments to the EHCP including details where views differ.  | Recommended amendments to EHCP to be shared with all involved ensuring the front cover summary sheet is returned with the paperwork  | School or Setting-SENCOs/host |
| **Step 5 LOCAL AUTHORITY DECISION ON EHCP** ***Within 4 weeks*** from the date of the meeting whether EHCP should:* remain unchanged
* be ceased (9.199-9.210)
* be amended

  | Inform in writing (letter) the parent, the CYP and the school/setting of its decision | Local Authority SEND officer |
| **Step 6 FOLLOW UP STEPS FOR LOCAL AUTHORITY:** |
| IF DECISION EHCP:* **should remain unchanged**
* **should be ceased (9.199-9.210)**

LA must inform the parent/YP of the following: * their right of appeal to the tribunal and the time limits for this to take place
* the requirement for them to consider mediation if they decide to appeal
* their right to receive information, advice and support from SENDIASS
 |  | IF DECISION EHCP: * **needs to be amended**

The LA must send to the parent/YP a copy of the unchanged version of the EHCP along with a notice outlining the proposed amendments as soon as possible, without delay and no later than 4 **weeks (not statutory but local indicator)** from the decision to amend letter * Include the supporting evidence for the proposed changes. This may include additional reports and notes from the meeting.
* Give parent/YP at least 15 calendar days to respond with their views. This could include naming a school. (CoP 9.78 & 9.94).
* Inform of their right to meet with the LA to discuss the proposed changes.

***within 8 weeks*** of date parent/YP informed of proposed changes, LA must either issue an amended EHCP or inform parents/YP they will not be amending it and give their reasons why and inform parents/YP of:* their right of appeal to the tribunal and the time limits for this to take place
* the requirement for them to consider mediation if they decide to appeal
* their right to receive information, advice and support

If the amended EHCP is issued it should clearly state it is an amended version and be dated. It should be clear which parts have been amendedThe LA must also inform the parent or young person of:* their right of appeal to the tribunal and the time limits for this to take place
* the requirement for them to consider mediation if they decide to appeal
* their right to receive information, advice and support.
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| **Step 7 FOLLOW UP STEPS FOR LOCAL AUTHORITY** |  | ONCE EHCP ISSUED:* SEND officer actions all on Mosaic and send a copy of the EHCP to All and the health generic email: nem-tr.wfhealthehc@nhs.net
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