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| **Key information for all parties:**   * Section 44 of the Children and Families Act 2014 stipulates that the first review must be held within 12 months of the date when the EHC plan was issued, and then within 12 months of any previous review. * All reports must be submitted to the local authority and to all attendees at least TWO WEEKS before the review is held. The annual review must be submitted to the local authority and to the attendees within TWO WEEKS of the review meeting date. This is to ensure that the process is completed within the statutory timescales. * It is a requirement for therapists who provide in-school therapy (occupational therapy, speech and language therapy, physiotherapy) to provide a report in the advance of each annual review. This is costed as part of the funding provided in the EHCP. * Although the EHCP may not be amended following the review, it is a legal requirement that the review itself – and all accompanying reports – are included as part of the appendices and thus all new information is included in the EHCP as a whole. * A significant change in an Education, Health, and Care Plan (EHCP) typically refers to any substantial alteration in the child's or young person's needs or circumstances that would require a modification of the support and services outlined in the plan. Here are some examples of what might constitute a significant change:  1. Change in Educational Needs: If there is a notable shift in the child's learning needs, such as a new diagnosis of a learning disability or a significant improvement or deterioration in academic performance, this would be considered a significant change 2. Health Changes: Any major changes in the child's health status, such as the onset of a new medical condition, a significant change in an existing condition, or recovery from a condition that previously required support, would necessitate a review and potential amendment of the EHCP 3. Social Care Needs: If there are substantial changes in the child's social care needs, such as a change in living arrangements, new safeguarding concerns, or the need for additional social care support, this would be a significant change 4. Transition to a New Educational Setting: Moving from one educational setting to another, such as transitioning from primary to secondary school or from school to college, often requires significant adjustments to the EHCP to ensure the new setting can meet the child's needs 5. Changes in Family Circumstances: Significant changes in the family situation, such as a move to a new area, changes in parental employment that affect the child's care, or other major family events, can also be considered significant changes   These changes are typically identified during the annual review process, but can be brought to the attention of the local authority at any time if they occur outside of the regular review cycle. The goal is to ensure that the EHCP remains relevant and effective in meeting the child's or young person's needs. |

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| Part 1: Child/Young Person’s Information | | | | | | |
| *Insert a photograph or picture if wanted* | | | | | | |
| **Child/Young person’s Name:** | | | | | **Date of Birth:** | |
| **UPN:** | | | | | **Date Plan Started:** | |
| **Current Band/Funding:** | | | | | **Date of this review:** | |
| **Child/Young person’s Address:**  ***Please fill out even if correct on EHCP*** | **Current Year Group:**  Choose Year Group | | | | **Current Setting:** | |
| **Child/Young Person’s Primary Need:**  Choose an item. | **Is the Child/Young person educated in their National Curriculum year group?**  Yes or No | | | | | |
| **Is the Child/Young Person supported by a social care practitioner?** | **Family Early Help:**  Yes or No | | **Child in Need Plan**  Yes or No | **Child Protection Plan?**  Yes or No | | **Looked After Child?**  Yes or No  **If yes, which authority?** |
| Part 2: General Information | | | | | | |
| **Please highlight any information that has changed from that which is provided in the current Education, Health and Care Plan** | | | | | | |
| **If there are no changes needed, please check the box and move to Part 3** |  | | | | | |
| **Changes to other information** *(religion, ethnicity, gender, preferred language)* |  | | | | | |
| **Parent /Carer 1 Information**  *(Name, address, telephone, email)* |  | | | | | |
| **Parent /Carer 2 Information**  *(Name, address, telephone, email)* |  | | | | | |
| **Health Contact Information**  *(New GP)* |  | | | | | |
| Part 3: Child/Young Person’s Views | | | | | | |
| What I’m good at and my achievements and successes over the past year: | |  | | | | |
| What’s important to me | |  | | | | |
| Things I like about me now | |  | | | | |
| What is working well for me now | |  | | | | |
| What I’d like to change | |  | | | | |
| My aspirations and goals for the future | |  | | | | |
| My aspirations/goals for further / higher education and/or employment | |  | | | | |
| My aspirations/goals for independent living | |  | | | | |
| My aspirations/goals for friendships, relationships and being part of the community | |  | | | | |
| My aspirations/goals to be as healthy as possible in adult life | |  | | | | |
| How I need to be supported to be heard and understood: including any strategies, and adaptations e.g., visuals, gestures, PECs, Makaton, photographs etc. | |  | | | | |
| Did anyone help me with this form? If so, how? | |  | | | | |

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| Part 4: Progress Since the Last Review (or since EHCP was created) | | | | | | | | | | | | | | |
| Preparation for Employment or Further/Higher Education (Cognition and Learning) | | | | | | | | | | | | | | |
| What can Name of the child/young person do now that she/he could not do at the time of the last review? If there has been no progress, please explain the reason(s) why. | | | | | | | | | | | | | | |
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| What support is needed, and can this be provided by the educational setting? | | | | | | | | | | | | | | |
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| Friends, Relationships and Community Participation (Communication and Interaction) | | | | | | | | | | | | | | |
| What can Name of the child/young person do now that she/he could not do at the time of the last review? If there has been no progress, please explain the reason(s) why. | | | | | | | | | | | | | | |
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| What support is needed, and can this be provided by the educational setting? | | | | | | | | | | | | | | |
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| Health (Social, Emotional and Mental Health) | | | | | | | | | | | | | | |
| What can Name of the child/young person do now that she/he could not do at the time of the last review? If there has been no progress, please explain the reason(s) why. | | | | | | | | | | | | | | |
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| What support is needed, and can this be provided by the educational setting? | | | | | | | | | | | | | | |
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| Independent Living (Physical and Sensory) | | | | | | | | | | | | | | |
| What can Name of the child/young person do now that she/he could not do at the time of the last review? If there has been no progress, please explain the reason(s) why. | | | | | | | | | | | | | | |
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| What support is needed, and can this be provided by the educational setting? | | | | | | | | | | | | | | |
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| Health | | | | | | | | | | | | | | |
| Have the child’s / young person’s health needs changed in the last year? | | | | | | | | | Yes | | | | No | |
| Current health package is: | | | | | | | | |  | | | | | |
| If the health needs have changed, please indicate how? | | | | | | | | | | | | | | |
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| Social Care | | | | | | | | | | | | | | |
| Have the child’s / young person’s care needs changed in the last year? | | | | | | | | | Yes | | | | No | |
| Current care package is: | | | | | | | | |  | | | | | |
| If the social care needs have changed, please indicate how? | | | | | | | | | | | | | | |
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| Part 5: Attainment and Attendance/Engagement with Education and Employment | | | | | | | | | | | | | | |
| Attendance (including any FTEs)  *(Explain any barriers to attendance and what support is being put in place to overcome these)* | | | | | | | | | | | | | | |
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| Attainment  *(Please give details of pupil’s current level of functioning, progress and achievement across year groups.)* | | | | | | | | | | | | | | |
| *Explain school’s system of assessment (or provide key):* | | | | | | | | | | | | | | |
|  | | English | | | | Maths | | | | Science | | | | Other (Specify) |
| **Last Year’s Attainment** | |  | | | |  | | | |  | | | |  |
| **Current Attainment** | |  | | | |  | | | |  | | | |  |
| Careers Advice | | | | | | | | | | | | | | |
| Specialist careers guidance engaged in (with date) | | | |  | | | | | | | | | | |
| Transport/Independent Travel Training | | | | | | | | | | | | | | |
| Does the child/young person receive SEND Transport? | | | | Choose an item. | | | | | | | | | | |
| Do the current transport arrangements remain appropriate? | | | | Choose an item. | | | | | | | | | | |
| Has there been any support towards independent travel? | | | |  | | | | | | | | | | |
| Is further support needed over the next year? What support should be considered? | | | |  | | | | | | | | | | |
| Post 16 Education (if applicable) | | | | | | | | | | | | | | |
| Courses already completed including level  achieved/partially achieved | | | |  | | | | | | | | | | |
| Current course including level | | | |  | | | | | | | | | | |
| Expected course end date | | | |  | | | | | | | | | | |
| Part 6: Review Meeting Information | | | | | | | | | | | | | | |
| **Invites sent out on (date):** | | |  | | | | | | | | | | | |
| **People Invited (Name)** | | | **Designation (*delete if N/A; add if needed*)** | | | | | | **Attended?**  **(Y or N)** | | | | **Report submitted? (Y or N)** | |
|  | | | Parent/carer 1 | | | | | |  | | | |  | |
|  | | | Parent/carer 2 | | | | | |  | | | |  | |
|  | | | SENCo | | | | | |  | | | |  | |
|  | | | CYP | | | | | |  | | | |  | |
|  | | | LA EHCP co-ordinator | | | | | |  | | | |  | |
|  | | | Speech and Language Therapist | | | | | |  | | | |  | |
|  | | | Occupational Therapist | | | | | |  | | | |  | |
|  | | | Social Worker | | | | | |  | | | |  | |
|  | | | CAMHS | | | | | |  | | | |  | |
|  | | | School Nurse | | | | | |  | | | |  | |
|  | | | Virtual School | | | | | |  | | | |  | |
|  | | | Educational Psychologist | | | | | |  | | | |  | |
|  | | | Specialist Teacher | | | | | |  | | | |  | |
|  | | | Employer | | | | | |  | | | |  | |
|  | | | Job Coach | | | | | |  | | | |  | |
| Part 6: Views of the Year | | | | | | | | | | | | | | |
| Parent/Carer’s View  *(What progress has been made over the year? What are your aspirations for your child/young person over the next year and in the long term? How can agencies best*  *support you and your child/young person?)* | | | | | | | | | | | | | | |
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| SENDIASS information (as below) was provided to the parent (should be at least two weeks in advance of the meeting) | | | | | | | | Date: | | | | | | |
| The Southwark Information Advice & Support Team (SIAS) can be consulted in advance for independent advice and support.  Telephone number 020 7525 3104. They can also discuss any services that may help your child & family via the Local Offer. | | | | | | | | | | | | | | |
| Educational Setting’s View | | | | | | | | | | | | | | |
| What is going well?  What is not going well?  What needs to happen? | | | | | | | | | | | | | | |
| Views of Other Professionals  *(e.g. if no report submitted by Educational Psychologist, Education Service for Sensory Impairment, Speech and Language Therapist, Occupational Therapist etc. if they attend the meeting)* | | | | | | | | | | | | | | |
| What is going well?  What is not going well?  What needs to happen? | | | | | | | | | | | | | | |
| Child/Young Person’s Aspirations for the next year | | | | | | | | | | | | | | |
| Preparation for Employment or Further/Higher Education (Cognition and Learning) | | | | |  | | | | | | | | | |
| Friends, Relationships and Community Participation (Communication and Interaction) | | | | |  | | | | | | | | | |
| Health (Social, Emotional and Mental Health) | | | | |  | | | | | | | | | |
| Independent Living (Physical and Sensory) | | | | |  | | | | | | | | | |
| Part 7: Review of Outcomes in Current EHCP | | | | | | | | | | | | | | |
| Outcome (Copied from EHCP) | | | | | | | | | Level of Progress (choose from list)   1. No progress since last year 2. Making some progress towards outcome 3. On track to meet outcome 4. Will meet outcome early 5. Achieved and NR (No longer relevant) | | | | Reason | |
|  | | | | | | | | | Choose an item. | | | |  | |
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| Part 8: EHCP changes (if requested) | | | | | | | | | | | | | | |
| **If there are no significant changes – and therefore it is recommended that the LA does not amend the EHCP following this annual review, please check this box.** *(There is then no need to complete the rest of Section 8).* | | | | | | | | | | | |  | | |
| **If you are completing this on the EHCP itself, please check this box.** *(Please note: this can ONLY be done if the EHCP is in the 2025 version)* | | | | | | | | | | | |  | | |
| *EHCPS are not expected to require frequent changes and updates. When they do need amending, there should be supporting evidence to inform any changes.*  • Recommendations for any amendments required to the EHC plan must be clear, quantifiable and based on the available evidence.  • Where there is any difference between the educational provider’s recommendations and those of others attending the Annual Review, please set this out in the box below.  If you would like to recommend changes, please specify in each box below sections to be deleted, amended or added (by cutting and pasting from the EHC plan – please request a Word version of the EHC plan if you do not have one). Please use the following key when proposing amendments:  • ~~strikethrough text~~ for deletions  • add new text in green | | | | | | | | | | | | | | |
| Preparation for Employment or Further/Higher Education (Cognition and Learning) | | | | | | | | | Friends, Relationships and Community Participation (Communication and Interaction) | | | | | |
| Strengths | | | Needs | | | | | | Strengths | | | | Needs | |
| Health (Social, Emotional and Mental Health) | | | | | | | | | Independent Living (Physical and Sensory Needs) | | | | | |
| Strengths | | | Needs | | | | | | Strengths | | | | Needs | |
| Provision | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | |
| Holistic SMART Outcomes (maximum of six) | | | | | | | | | | | | | | |
| 1. I will… 2. I will… 3. I will… 4. I will… 5. I will… 6. I will… | | | | | | | | | | | | | | |
| The Annual Review report should reflect the views of everyone at the meeting. Please record in the box below any different views that any attendees have in relation to requested amendments to the EHCP | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | |
| Costed Provision Map | | | | | | | | | | | | | | |
| **Long Term Outcome (as per EHCP)** | | | **Name of Provision** | | | | | | **Cost Per Term** | | | | **Cost Per Year** | |
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| **TOTAL ANNUAL COST:** | | |  | | | | | | | | | |  | |
| Part 9: Summary | | | | | | | | | | | | | | |
| **How is the provision promoting independence and reducing the reliance on additional support?** | | | | | | |  | | | | | | | |
| **What is the pathway, with associated planning, towards ceasing the plan (when appropriate)?** | | | | | | |  | | | | | | | |
| **Is the Child/Young Person ready for the plan to be ceased?** *(see guidance)* | | | | | | | Choose an item. | | | | | | | |
| **Does the plan need to be redrafted?**  *This will be following phase transfer meetings, e.g., where the Child/Young Person is due to move to a new provision –*  *Year N, [Year 1 if moving from an infant to a junior school], Year 5, Year 11 only; unless agreed by LA representative* | | | | | | | Choose an item. | | | | | | | |
| **Is the child / young person due to move educational setting at the end of the next academic year?**  *For young people moving into a Post 16 institution or between settings this is the 31st of March* | | | | | | | | | | | | | | |
| Yes or No | **Name of school / college / training provider (if known)** | | | | | | | | | | **Date of expected transfer** | | | |
| **New professional advice** (*this is a requirement for any changes to Section F or any increase in funding – this advice can come from EP, SALT, CAMHS, AST, HI, VI, or other external specialist, or the school itself if a rigorous APDR process has been followed – as shown in cycles of support above*) | | | | | | | | | | | **Professional details** | | | |
|  | | | | | | | | | | |  | | | |
| **PERSONAL BUDGET**  Has a personal budget been requested by the parents/carers or young person?  If yes, please specify the details of the request | | | | | | | | | | | **Yes/No** | | | |
|  | | | | | | | | | | | Choose an item. | | | |
| **LOCAL OFFER** | | | | | | | | | | | **Please check box below** | | | |
| The Parents/Carers have been signposted to the local offer as a source of information, support and impartial advice for children/young people and their parents/carers: <https://localoffer.southwark.gov.uk/> | | | | | | | | | | |  | | | |
| **Actions to take place following the annual review** | | | | | | | | | | | **By Whom?** | | | |
|  | | | | | | | | | | |  | | | |
| ***Local Authority Administration only:*** | | | | | | | | | | | | | | |
| ***In the case of direct actions for the borough, the EHCP coordinator must contact parents/carers and the education setting within 2 weeks (unless the coordinator attended the review, in which case the parties will hear from the panel within 4 weeks).*** | | | | | | | | | | | | | | |
| **Record of Co-ordinator contact** | | | | | | | | | | | **Date:** | | | |
| **Actioned by:** | | | | | | | | | | |  | | | |
| **Signed off by Local Authority for (name and designation):** | | | | | | | | | | | **Date:** | | | |
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| **NOTE:**  Following the meeting, the LA will be seeking views from the young people and families directly, via the school, about their experience of the review meeting. This data will be used to improve the quality of annual review going forward. | | | | | | | | | | | | | | |