



Guidance Notes for Key Worker on completing Review of Education Health and Care Plan Report

1. Introduction

The school, institution or educational provider should complete this form, on at least an annual basis, in respect of every child or young person on roll for whom the Local Authority (LA) continues to maintain an Education, Health and Care Plan (EHCP).

The EHC review must use a person-centred approach and must be undertaken in partnership with the child and their parent or young person and must take account of their views, wishes and feelings.

Reviews should focus on the child or young person's progress towards achieving the outcomes specified in the EHCP and consider whether the outcomes and supporting targets remain appropriate.

All reviews taking place from Year 9 onwards must include a focus on preparing for adulthood, including employment, independent living and participation in society. The transition planning must be built into the EHC plan and where relevant should include effective planning for young people moving from children's to adult care and health services.

For looked after children, the EHC review meeting should, if possible and appropriate, coincide with one of the reviews in their Care Plan and in particular the personal education plan (PEP) element of the Care Plan.

A copy of all reports to be considered at the review should be sent out to parents, the young person (post 16) and invited professionals, two weeks before the review date. The school, institution or educational provider must prepare and send the completed Review of Education, Health and Care Plan form and the proposed amended plan if required together with any other reports to everyone (including the LA) invited within two weeks of the meeting.

The review report must be completed as fully as possible, ensuring the information is accurate.

2. Contents

The key worker can delete from the review report sections that are not applicable to the child/young person.

3. Top of Page (Page 1)

The key worker should record the child or young person's name, date of birth, year group, name of the school, institution or educational provider, date of the current EHC Plan and date of review meeting.

4. Section 1 – Details of my review meeting (Page 1)

Summary of meeting including recommendations

This section will be completed at the end of meeting to summarise decisions and required actions.

The review meeting will need to consider:

- the continuing appropriateness of the EHC plan in the light of the child or young person's progress during the previous year
- any changes are required including any changes to outcomes, enhanced provision, change of placement
- whether to maintain the EHC plan or should it be discontinued.
- changes required to the CRISP or banded funding level. This must be supported by evidence and a revised CRISP form should be attached.

This section should be completed by the key worker and is used to record the recommendation agreed at the meeting. If any person attending the review does not agree with the recommendation then this should be recorded by the key worker in the box provided in Section 4. Any amendments must be supported by evidence and details of the amendments recommended must be outlined in the report. Please note these are recommendations for the Local Authority to consider and should not be considered an agreement as to the outcome of the review.

Persons invited to review my plan

This section of the review report provides information on the names of those invited to attend the review meeting. It should list the child or young person and parent as well as representatives from the school, institution or educational provider and invited professionals. The key worker will need to clearly indicate in the yes/no sections those that attended the meeting and whether written information was provided. Any written information should be attached to the review report.

5. Section 2 – Review of my progress in relation to my EHC Plan (Page 2)

This section of the review report links directly to the child or young person's EHC Plan. Each heading signposts key workers to the relevant part of the EHC plan. Working in partnership with the parent/carers and the child/young person review and update the information.

About Me - Child or Young Person's Views, Wishes and Feelings, My Strengths, My Family's Views (EHCP Section A)

My Special Educational Needs (EHCP Section B)

My Health Needs (EHCP Section C)

My Social Care Needs (EHCP Section D)

Each heading asks questions in relation to specific sections of the EHC plan. The key worker will guide those present at the review meeting to each section. The contribution of the child or young person' and their parent/carer is an important part of the review process. The key worker will need to summarise the discussion and information and indicate whether any amendments are required to the EHC plan. If amendments are needed then these should be detailed in the report.

Review of my Outcomes (EHCP Section E) (Page 3)

This section requires the meeting to focus on progress towards achieving outcomes in the EHCP. The key worker will complete this section by agreeing the progress achieved (Some, Fully, Not) and summarise any comments or amendments. If changes are recommended to the long term outcomes then these should be recorded by the key worker in the report.

Review of my Provision and Support – (Section F to H2) (Page 4)

This section requires the meeting to consider whether the special educational provision and support is effective in ensuring good progress towards the outcomes. The key worker will need to summarise the discussion and information. If changes are required then these need to be evidenced and recorded in the report.

Review of my Educational Placement (Section I) (Page 4)

This section requires the meeting to consider if the current placement is still appropriate. If no then the key worker will need to summarise the discussion and provide evidence of why the placement is no longer appropriate.

Transfer between phases of education or change of school (delete if not appropriate) (Page 4)

The Educational Placement section provides those at the meeting with the opportunity, if needed, to discuss the appropriate type of placement. This is most relevant looking ahead to the phase transfer of pupils/young people. The phase transfer relate to pupil/young people moving from nursery to reception, infant to junior, primary to secondary (Year 5), secondary school to post 16 setting or apprenticeship and secondary school or institution to Post 19 setting. There are specific times when this will need to be considered:

15 February of the year of transfer - The review meeting must be held to enable the **Local Authority to finalise the EHCP by this date** for a child or young person moving between phases of education (with the exception of a young person moving to a post 16/19 settings). The

Local Authority will provide guidance and timescales to schools, institutions and educational providers on this process to ensure the deadline is met.

31 March of the year of transfer – The review meeting must be held to enable the **Local Authority to finalise the EHCP by this date** for young people moving from a secondary school to post 16 setting or apprenticeship and secondary school or institution to Post 19 setting. The Local Authority will provide guidance and timescales to schools, institutions and educational providers on this process to ensure the deadline is met.

In addition it may be recommended at the meeting that a change of placement is required because there has been a significant change in the needs of the child/young person or enhance provision is now required in an alternative placement.

If the child or young person falls within these categories then the appropriate section is completed by the key worker who will indicate the preferred placement or type of placement and will record the comments of the parent/carer and child/young person. If a change of placement is recommended this will need to be supported by evidence and reports from those involved particularly the Educational Psychologist from the Local Authority. Boxes that are not applicable can be removed to make the form more user friendly.

Review of my Personal Budget (including arrangements for direct payments) (Section J) (Page 5)

The Review of Personal Budget section should include the review of any existing Personal Budget arrangements for direct payments and any request for a personal budget. A parent or the young person has a right to request a personal budget during a review of an EHC plan. Details of the proposed personal budget should be included in section J of the EHC plan

Preparing me for Adulthood – Year 9 onwards (Page 5)

Information about the transition to adulthood for Year 9 onwards should always be included. This will inform the young person's career plan. The transition planning to adulthood must be built into the EHC plan. It is important in these reviews to seek and record the views, wishes, feelings and aspirations of the young person. Focus

discussion is on what support and provision will best support the young person towards the desired outcomes. Support the meeting to consider what needs to happen in order to achieve a smooth transition to the next steps towards what the young person wants to achieve. Supporting the young person to move to greater independence should always be considered in areas such as independent travel and steps recorded as to how this can be achieved.

6. Section 3 – Additional Information on my Educational Progress (Page 5/6)

This section of the review report is divided into 2 areas:

Early Years and School Assessments

Post 16 courses

The school, institution or educational provider is asked to list and attach any relevant data regarding the child's or young person's educational progress. The data should also include the progress on the primary area of need. The attendance data should be attached and any issues discussed. It is possible that poor attendance may lead to an outcome being identified for inclusion as part of the plan. The key worker will need to delete from the report the area (Early years/school or post 16 courses) that is not relevant to the child/young person.

7. Section 4 – Any differing views and signatures (Page 6)

If any person attending the review does not agree with the recommendation then this should be recorded by the key worker in the box provided in Section 4.

Signatures (Page 6)

The review report must be signed by the child/young person, parent/carer, and key worker leading the review and Head teacher/Principal. **As a matter of good practice where the pupil/young person has been involved and engaged in the meeting and are aware of the content of their plan then they should sign the form.** For pupils in post-16 placements they must sign the annual review paperwork and the signature of the parent is advisable but not essential. In post-16 placements it is the young person who makes decisions about the support they receive through the plan. Please note, there may be occasions where it is not in the best interests of a child/young person to sign the review paperwork, for example involving issues of capacity to understand the recommendations being made or proven to lack mental capacity.

8. Report and information returned to SENAR

Within **two weeks** of the review meeting, the key worker should send the following to the SENAR mailbox:

- Review of EHCP report



- Reports considered at the at the review meeting,
- Annotated EHC Plan with amendments recorded (if changes recommended)