

## Summary to support completion of checklist and template for completion during Annual Review – Nursery to Year 6

Part and description	Notes	<ul style="list-style-type: none"> <li>• To be completed</li> <li>• Optional</li> <li>• If appropriate</li> </ul>	Page number
<b>Part 1 – starting off the Annual Review paperwork</b>			
- EHCP front page	Used to update LA records	Complete	1
- Type of review	Enables LA to prioritise	Complete	1
- Type of need	Used to update LA records for statutory	Complete	2
- Primary need	Used to update LA records for statutory	Complete	2
- Conclusion of the review		Complete	3
- Sign-off	Any educational professional can sign-off the Annual Review. Signing off accuracy of the demographic data and summation of meeting	Complete	3
<b>Part 2 – sending out</b>			
- Requests for advice / reports / information	The people to send out invites and request reports that are appropriate for the pupil are listed on the sheet, but it is optional to record what you have sent out / received / attendance at the review.	Optional	5 to 7
<b>Part 3</b>			
- Survey for children and young people	Anonymous responses for the LA to report on to the SEND & Inclusion Partnership	Complete	8
- Collating voice for section A prior to Annual Review meeting (children and young people)	One Page Profile available as an example on the website but schools can use their own or collate voice in an appropriate format for the pupil	Complete	9
- Collating voice for section A prior to Annual Review meeting (parent/carer)	One Page Profile available as an example on the website but schools can use their own. Feedback from the SEND Hub (Parent Carer Forum) has been that parent/carers would like time to think about their contribution to the Annual Review meeting.	Complete	9
<b>Part 4</b>			
- Attendance at the Annual Review meeting		Complete	10
- Alternative means to contribute to the Annual Review		If appropriate	10
- Reason for child / young person non-attendance at Annual Review meeting		If appropriate	10
- Section A	If a One Page Profile has been completed, this section can be left blank	Optional	12 & 13
- Sections C, G, D, H1/H2 - Health and Social Care sections	Not all children and young people will have identified health and/or social care (Targeted Early Help / Social Care) needs	If appropriate	14

- <b>Sections B and F - New needs and provision</b>	New needs and associated provision can be included on the EHCP by adding in a new row. If this doesn't work, please add in the notes box for needs and provision. If amending needs and provision, complete this on the EHCP	Optional	<b>15</b>
- <b>Section E - outcomes</b>	Complete a review of the outcomes and record in the grid. Year 9+ will need outcomes and associated provision recorded from the conversation held previously.	Complete	<b>15 &amp; 16</b>
- <b>Section J - Personal Budget</b>	Optional to ask the question but young people and parent/carers have the right to request	Optional	<b>17</b>
<b>Part 5</b>			
<b>Checklist for documentation to be sent to the Local Authority</b>			<b>19</b>
- <b>The Annual Review meeting template</b>		Complete	<b>19</b>
- <b>CYP voice</b>		Complete	<b>19</b>
- <b>Parent/carers voice</b>		Complete	<b>19</b>
- <b>Cost of provision map</b>		Complete	<b>19</b>
- <b>Record of attendance</b>		Complete	<b>19</b>
- <b>Evidence of attainment / progress</b>		Complete	<b>19</b>
- <b>Individual Health and Care Plan</b>		If appropriate	<b>19</b>
- <b>Annotated EHCP</b>		Complete	<b>19</b>
- <b>Other school advice / reports</b>		If appropriate	<b>19</b>
- <b>Health service advice / reports</b>		If appropriate	<b>19</b>
- <b>LA Social Care advice / report</b>	Targeted Early Help, Children/Adult Social Care, Short Break	If appropriate	<b>19</b>
- <b>Privately sourced reports</b>		If appropriate	<b>19</b>
- <b>Final sign-off of documentation</b>		Complete	<b>19</b>