

Leicestershire **SEND**



**Annual Review training
– Nursery to Year 6
March 2025**



Documents available



[SENA](#) webpage on Professional Resource web area

Nursery to Year 6

[Annual Review framework guidance - Nursery to Year 6](#) >
PDF, 586.36 KB

[One Page Profile - Nursery to Year 6](#) >
DOCX, 3.23 MB

[One Page Profile - Nursery to Year 6 \(parents/carers\)](#) >
DOCX, 20.73 KB

[Annual Review checklist template - Nursery to Year 6](#) >
DOCX, 3.73 MB

[Summary of completion of checklist template - Nursery to Year 6](#) >
PDF, 91.1 KB

Annual Review guidance - Nursery to Year 6

What is an Annual Review of an Education, Health & Care (EHC) Plan?

Once an EHCP has been issued, a review of the EHC plan should take place on a least a termly basis and then each subsequent year, an Annual Review meeting will take place for those children and young people aged 5 onwards. For pre-school aged children, the EHCP should be reviewed every 3 to 6 months. Leicestershire County Council asks that schools, colleges and providers carry out the Annual Review process on their behalf.

If there are significant changes to a child or young person's needs, an early review can take place.

The Annual Review meeting is a formal opportunity for the child or young person, the parent or carer, the school and others working with the child or young person to discuss about the progress of the child or young person's EHC Plan. The review must consider whether t

One Page Profile for child – to be completed prior to Annual Review meeting

Name of pupil:	Completed by:	Date:			
How do you prefer to communicate? <i>Please indicate by adding bold or highlight relevant method</i>					
	Talking to an adult	Writing or typing	Drawing or choosing pictures	Alternative Technology methods	Video / photo
Comments:					

What is working well in school? (Think about: Adults who help you in school; Break time; Learning / lessons; Moving around school; Friendships)

One Page Profile from parent/carer (send out - to be completed prior to Annual Review meeting)

What is working well in school: Think about: <ul style="list-style-type: none"> Adults who help in school; Break / lunchtime; Learning / lessons; Moving around school; Friendships 	
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Annual Review of Education, Health and Care Plan

Checklist and template for completion as part of the Annual Review meeting For children in Nursery to Year 6

Part 1: To be completed

My Name: _____

Date of Birth	Click or tap to enter a date	Unique Pupil Number	LA to complete
Address			

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"> To be completed Optional If appropriate 	Page number
Part 1 – starting off the Annual Review paperwork			
- EHCP front page	Used to update LA records	Complete	1
- Type of review	Enables LA to prioritise	Complete	1



Annual Review checklist / template

- Front page of the EHCP to ensure any updates are provided, e.g. change in address

Annual Review of Education, Health and Care Plan

Checklist and template for completion as part of the Annual Review meeting

For children in Nursery to Year 6

Part 1: To be completed

My Name:

Date of Birth	Click or tap to enter a date	Unique Pupil Number	LA to complete
Address			
Parental Responsibility (Name)	Relationship to Child		
Telephone Number			
Email Address			
Religion	NHS Number		
First Language	Date Original EHCP Agreed	LA to complete	
Ethnicity	Version Number	Date EHCP Issued	LA to complete
My (Parent/ Carer) Name is	Social Care Status		
I Live With	Please Select	If Other Please Specify	

Type of Annual Review

- [Scheduled Review](#) [Early Review](#)
[Transition Review](#) [Updated Plan Following Tribunal](#)

During the Annual Review meeting Concluding the meeting (Page 2 and 3)



Refer to Annual Review guidance document – page 18 and 19

Conclusion of this review

- a. **Keep** the plan as it is.
- b. The outcomes have been achieved so it is recommended that the LA should **cease to maintain** the EHCP.
- Reason for cease to maintain:
.....
- c. **Amendments are recommended** (please see annotated EHCP).
- Other additional information:
- Parent/carers would like consideration for a different type of educational setting.
Name of school.....
- School cannot meet need.
- Special school previously agreed
- Other reason for amending – please state:
- d. It is recommended that the LA carry out a **new statutory re-assessment** of the pupil's needs due to significant changes.
- e. Updated **transport risk assessment** required.

Signed by Head Teacher, SENDCo or other educational professional from the school:

Name (Printed):

Date:

Role:

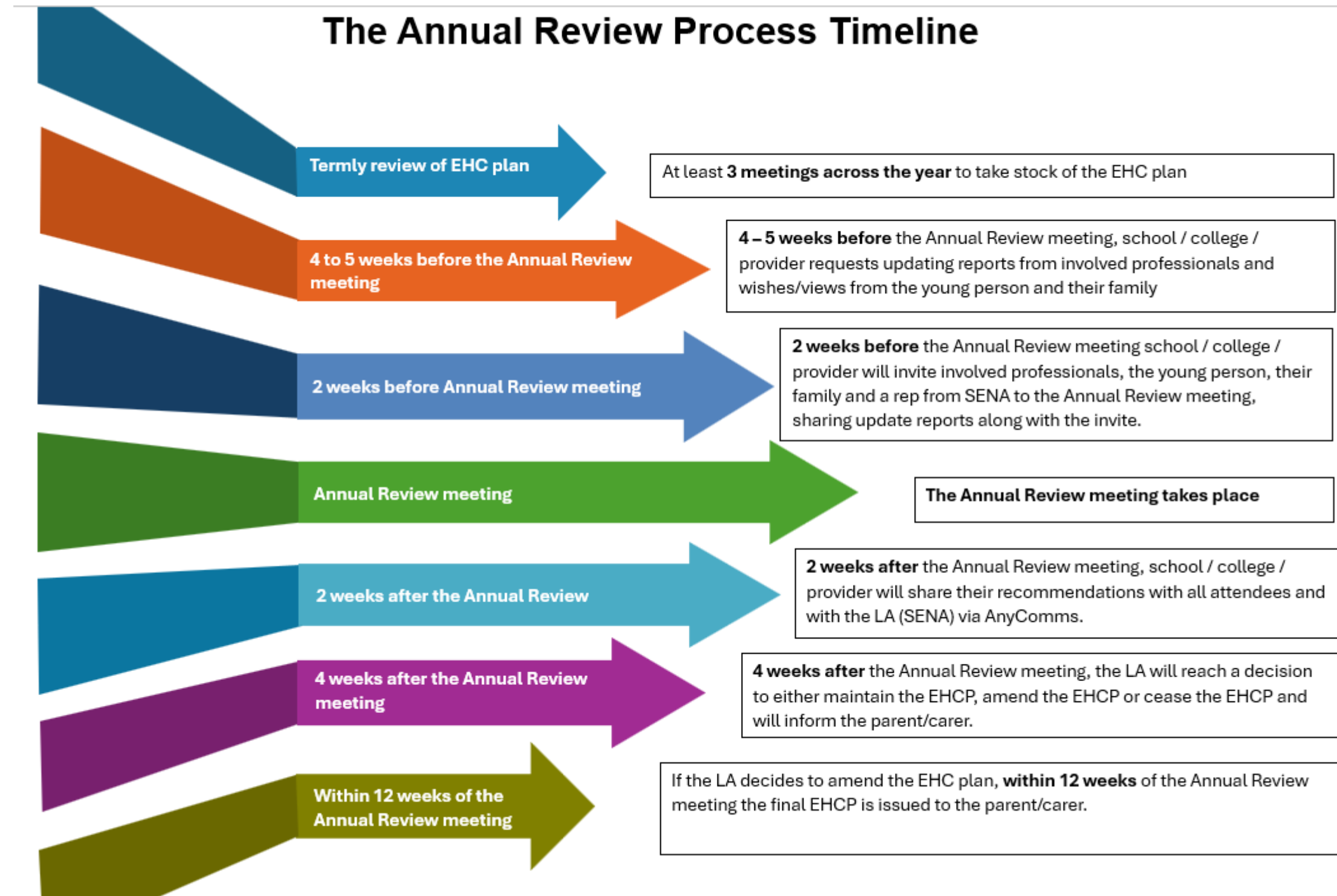
Please indicate the person who hosted the review meeting:

- This section now includes a box to tick.
- A signature is required to be added which can be the Headteacher, SENDCo or other educational professional. The sign-off is to ensure that all information is accurate

Annual Review checklist / template

- All in one document - checklist to follow through the steps required for the Annual Review process and template to complete during the Annual Review meeting

An Annual Review should be carried out within a 12-month period starting with the date on which the plan was first made and then each 12-month period starting when the date on which the plan as reviewed or within 6 months for children under the age of 5.



Prior to Annual Review meeting – SEN Reg 20.(2) and (4) Requesting reports (page 6/7)

Part 2: Optional for completion

Full list of contributors (blanks left to add in any additional invitees)

Name	ROLE (EP, Therapist, Child/Young Person, Parent/carer)	Information required	To be completed / optional / appropriate	Advice or report requested	Invited to Annual Review meeting	Advice or report received
	Child or Young person	Voice (One Page Profile example available)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Parent/carer	Voice (One Page Profile example available)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Educational setting	Timetable of support (this would be the costed provision map without costings)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Name	ROLE (EP, Therapist, Child/Young Person, Parent/carer)	Information required	To be completed / optional / appropriate	Advice or report requested	Invited to Annual Review meeting	Advice or report received
		requested as part of the documentation at the end of the Annual Review				
	Educational setting	Current EHCP in use (Word)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Education representatives (include tutors)	Advice or report (if appropriate)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Educational setting	Record of attendance		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Educational setting	Individual Health Care Plan		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Health service representatives	Advice or report from health services		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Local authority social care representative (see note at bottom of table) Children's or adult	Advice or report from Family Help staff, e.g. SEND Family Support Workers, Keyworkers; Children's Social Workers; Young Adult Disability team; Adult Social Workers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Local Authority SEN officer	Send an electronic invite to senaservice@leics.gov.uk - a paper letter is not required			<input type="checkbox"/>	

Name	ROLE (EP, Therapist, Child/Young Person, Parent/carer)	Information required	To be completed / optional / appropriate	Advice or report requested	Invited to Annual Review meeting	Advice or report received
	SENA Business Support	Contact to request a Word version of current final EHCP for recording annotation		<input type="checkbox"/>		<input type="checkbox"/>
	Privately sourced provision	Advice or report		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Action required	Associated document	Date
Health requesting schools to email: LPT.EHCAR@nhs.net	Health professional contribution to annual review (Word document)	8 weeks prior to Annual Review meeting

The information provided via this email will only be for Leicestershire Partnership Trust involvement. If you require information from other NHS providers, the best option is to speak to parent/carer to request reports.

Prior to Annual Review meeting

Children and young people survey (page 9)

In the LA we get asked a number of times as to how our children and young people with an EHCP are being supported. The survey provides an opportunity to capture this information at an appropriate time with children and young people.

Part 3: **To be completed**

Work prior to the Annual Review

Survey to be carried out with child or young person before the Annual Review meeting



<https://bit.ly/41aqV2p>

Questions within the survey:

1. What type of school do you go to?
 - Primary school
 - Secondary school
 - Special school
 - Other
2. What does the support you have at school help you to do?
Free text
3. How often, if at all, do you feel that you are getting the right support to help you at school?
All of the time Most of the time Some of the time
Not very often Never Don't know
4. Is there anything else you would like to say about the support you have at school?
Free text.

This response was provided by the:






- a. Me – the child or young person
- b. A representative on behalf of the child or young person

N.B. This information is being used as part of the Accelerated Progress Plan and reporting on the SEND & Inclusion Strategy.

Prior to Annual Review meeting – SEN Regs 19.(a), 20.(5) One Page Profile - Children and Young People (page 10)

One Page Profile for child – to be completed prior to Annual Review meeting

Name of pupil:	Completed by:	Date:
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How do you prefer to communicate? <i>Please indicate by adding bold or highlight relevant method</i>					
	Talking to an adult	Writing or typing	Drawing or choosing pictures	Alternative Technology methods	Video / photo
Comments:					

What is working well in school? <small>(Think about: Adults who help you in school; Break time; Learning / lessons; Moving around school; Friendships)</small>
What does the support you have at school help you to do?
What makes me happy (interests, passions and skills that are important to me): <small>(Think about: Interests and hobbies; Social skills: kind, sharing, funny, etc. Lessons; Activities attended)</small>
This is how I would like to supported (other things that I would like people to know): <small>(Think about: Adults who help you in school; Break times; Learning / lessons; Moving around school; Social skills / Friendships; access to activities)</small>
Things that I do in my local community and how I am supported to do them: <small>(Think about: Activities attended; Social skills / friendships; Support from family/friends; Short Breaks / direct payment / personal assistant)</small>

Things that I would like to do but I can't: <small>(Think about: In school; At home; Near where you live)</small>
What is getting in the way of being able to do some things that I would like to be able to do: <small>(Think about: Skills needed; Adult support required; Transport; Money)</small>
What would I like to be able to achieve this year: <small>(Think about: Interests and hobbies; Social skills; Lessons; Activities to attend)</small>
This is what I want for the future (hopes and dreams): <small>Think about:</small> <ul style="list-style-type: none"> • Transition to school, other setting, college – choosing GCSE or A levels; vocational study, apprenticeship or a supported internship • Interests / aspirations for employment – what qualifications are needed (if secondary age) • Independence (life skills, e.g. money, travel, dressing, toileting, safety) • Community participation (friendships, clubs, activities, etc) • Health - staying healthy, self care and personal safety

- Feedback from SENDCoNet was that the One Page profile is useful and a template was requested. This can be found here: 
- The questions in the One Page Profile correlate with the EHCP

Gathering voice resource

- A Specialist Teaching Service resource providing examples of different ways to capture voice



Gathering Children's and Young People's Voice to contribute to an EHCNA or Annual Review

A: Resources & approaches to gather views of non-speaking learners

B: Resources & approaches to gather views of learners requiring alternative approaches to communication


C: Resources & approaches to gather views of learners able to communicate independently

D: Other resources for gathering voice

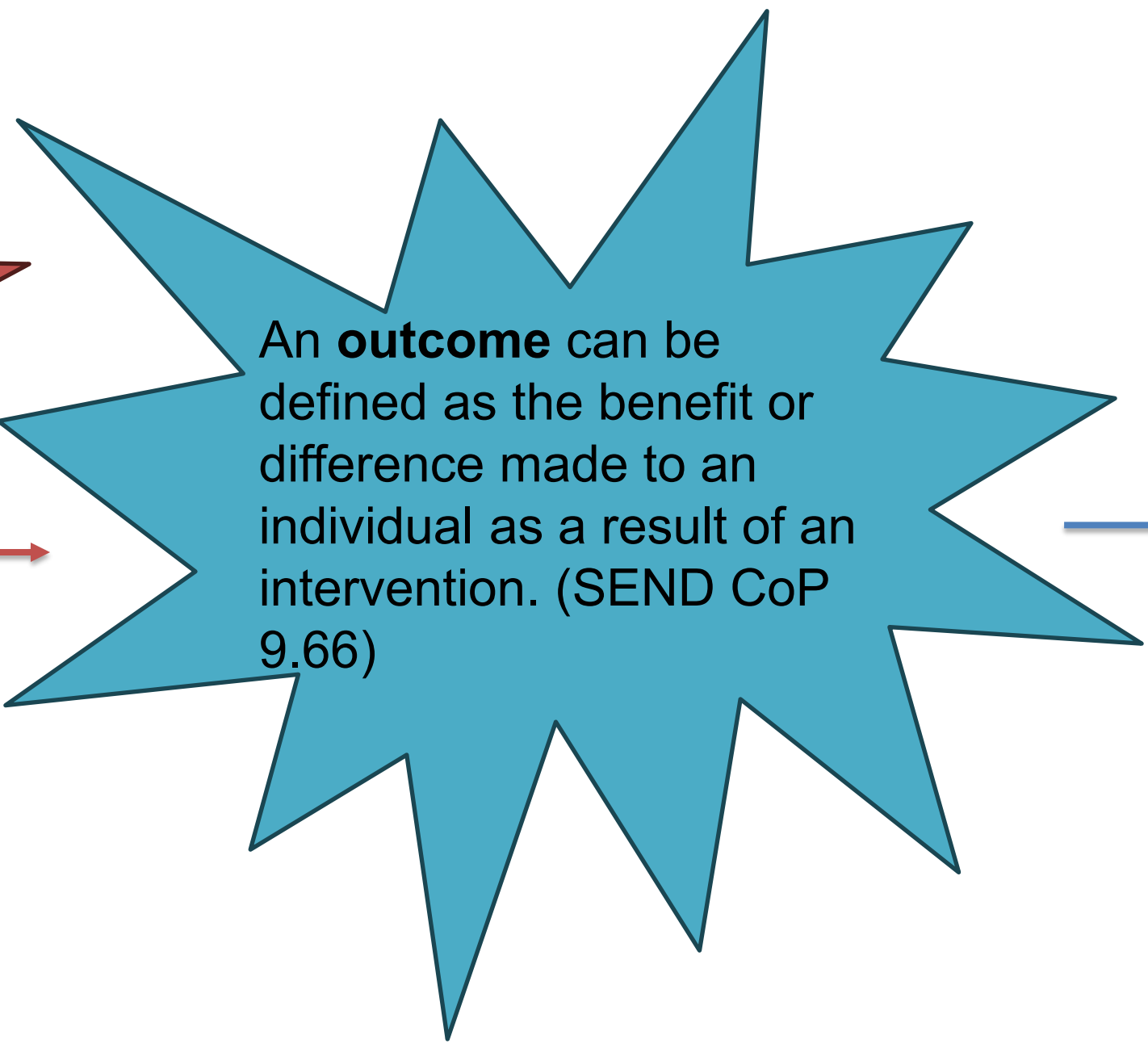


Aspirations and sought outcomes to SMART outcomes

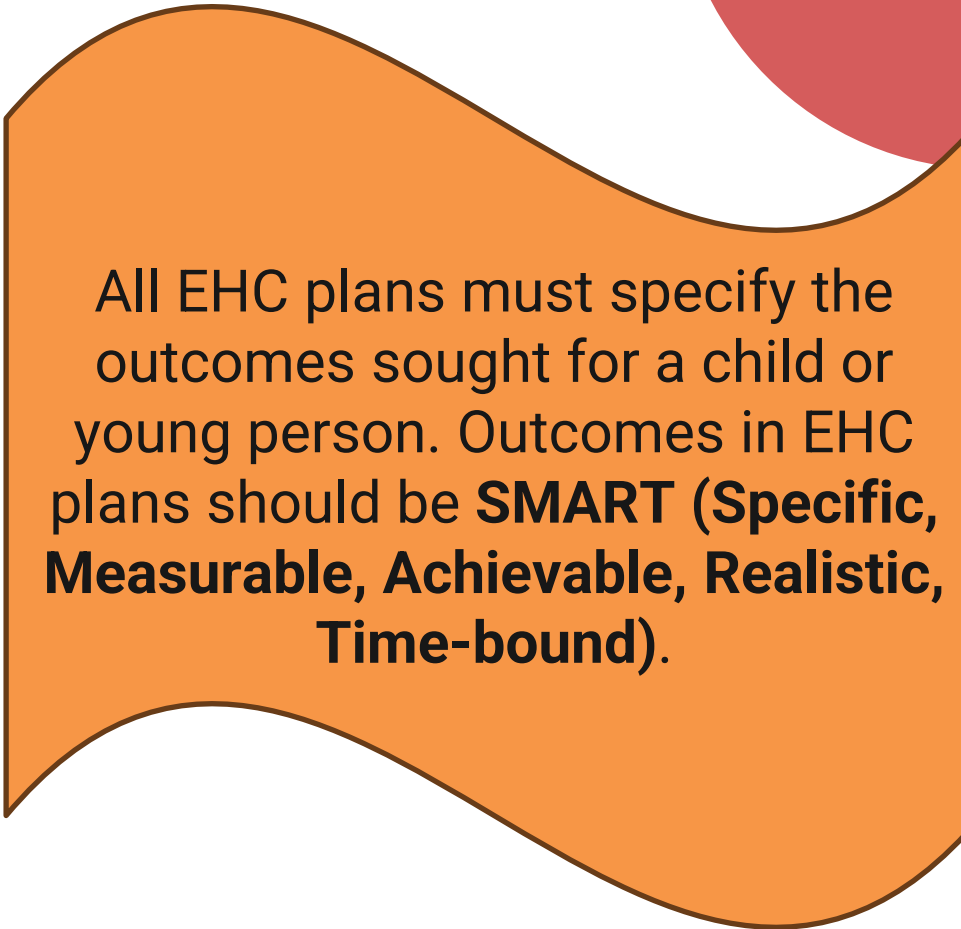
Leicestershire County Council places great value on the voice of the child, particularly to find out about their future aspirations (whatever their age). This is the thread that brings together the different sections of the Education Health and Care plan leading to SMART outcomes.



An **aspiration** is a hope or ambition of achieving something.



An **outcome** can be defined as the benefit or difference made to an individual as a result of an intervention. (SEND CoP 9.66)



All EHC plans must specify the outcomes sought for a child or young person. Outcomes in EHC plans should be **SMART (Specific, Measurable, Achievable, Realistic, Time-bound)**.

Prior to Annual Review meeting

One Page Profile - Parent/ Carers (page 10)

One Page Profile from parent/carer (send out - to be completed prior to Annual Review meeting)

<p>What is working well in school: Think about:</p> <ul style="list-style-type: none"> Adults who help in <u>school</u>: Break / <u>lunchtime</u>: Learning / <u>lessons</u>: Moving around <u>school</u>: Friendships 	
<p>This is how I would like my young person to be supported (other things that my parents would like people to know): Think about:</p> <ul style="list-style-type: none"> Adults who help in <u>school</u>: Break / <u>lunchtimes</u>: Learning / <u>lessons</u>: Moving around <u>school</u>: Social skills / <u>friendships</u>: Access to activities 	
<p>Things that the health service support my young person with and how it helps: Think about, for example:</p> <ul style="list-style-type: none"> CAMHS Community Paediatrician Speech and Language Therapy Physiotherapy 	
<p>Things that I do in my local community and how I am supported to do them: Think about:</p> <ul style="list-style-type: none"> Activities <u>attended</u>: Social skills / <u>friendships</u>: Support from family/<u>friends</u>: Short Breaks / direct payment / personal assistant) 	

<p>What is getting in the way of being able to meet outcomes across education, health and care: Think about:</p> <ul style="list-style-type: none"> Skills <u>needed</u>: Support required: Environmental issues <u>Transport</u>: Money 	
<p>Aspirations and hopes and dreams for the future (this is what my family want for my future):</p> <ul style="list-style-type: none"> Transition to school, other setting, college – choosing GCSE or A levels; vocational study, apprenticeship or a supported internship Interests / aspirations for employment – what qualifications are needed (if secondary age) Independence (life skills, e.g. money, travel, dressing, toileting, safety) Community participation (friendships, clubs, activities, etc) Health - staying healthy, self-care and personal safety 	

- Feedback from the SEND Hub is that parent/carers would like to be more of a part of the process but don't always feel well prepared. Therefore, a template to collect the parent/carer voice is also available which can be found here:



- This should be sent to the parent/carer to be completed prior to the Annual Review meeting

During the Annual Review

Template for completion during the Annual Review meeting (page 11 onwards)

Part 4: To be completed
During the Annual Review meeting
Who attended the meeting?

- This page is the start of the documentation for the Annual Review meeting
- The information on how voice was captured was included in the previous version – this has been enhanced where alternative means of communication to capture voice can be included, if appropriate

Name	ROLE (Educational Psychologist, Therapist, Child/Young Person, parent)	Attended Yes / No
	Child or Young person	Yes/No.
	Parent/carer	Yes/No.
	Setting, school, college representative	Yes/No.
		Yes/No.
	Education representative (include tutors)	Yes/No.
		Yes/No.
	Health service representative	Yes/No.
	Local authority social care representative, e.g. Family Help – SEND Family Support Worker, Keyworker; Children's Social Worker, Young Adult Disability Social Worker; Adult Social Worker	Yes/No.
	Local authority SEN officer	Yes/No.
	Privately sourced provision	Yes/No.
		Yes/No.



Refer to Annual Review guidance document – page 9

If the child or young person contributed through alternative means, please include the method used:

If the child/young person did not attend or contribute to the review, please provide reasons why and what support has been provided to ensure their views have been gathered and included:

During the Annual Review

Recording the conversation

- As part of the written report provided back to the LA, the SEN Regulations refer to the following ... referring to any difference between those recommendations and recommendations of others attending the meeting.
- Note sections where the conversation can be recorded have been included against the different sections.

Recording the conversation



Refer to Annual Review guidance document – pages 7 and 8

Please note the key points discussed during the discussion in the note section.

Taken from the SEND Code of Practice:

9.177 The meeting must focus on the child or young person's progress towards achieving the outcomes specified in the EHC plan, and on what changes might need to be made to the support provided to help them achieve those outcomes, or whether changes are needed to the outcomes themselves.

Taken from the SEN Regulations:

20. (7) Where the child or young person attends a school referred to in paragraph (12), the local authority must ask the head teacher or principal of the school to prepare a written report on the child or young person, setting out that person's recommendations on any amendments to be made to the EHC plan, and referring to any difference between those recommendations and recommendations of others attending the meeting.

Completing the conclusion of the Annual Review meeting and relevant notes sections in this document meets this requirement.

Also consider:

- Preparation for Adulthood (or the future)
- Aspirations – what I would like to achieve?

During the Annual Review

Section A (Pages 13)

- Section A provides the thread that should run through the rest of the EHCP as exemplified on slide 10.
- To complete the boxes under Capturing voice, either refer to the One Page Profile or complete on the template.

Section A - Optional if completed a One Page Profile

Capturing the voice of the child (the thread that runs through the EHCP)

This is what I want for my future:
This is how I would like to be supported

Capturing the Voice of Parent/carers:

This is what my parent/carers aspirations are for me in the future:
This is how my parent/carers will support me

During the Annual Review

Working through the EHCP – annotating the EHCP (Page 21)

Annotating the EHCP - guidance for changes to the EHCP

Please note: All edits must be on the word document of the EHCP. If you only have a PDF version, please contact SENA for them to reissue as a word document. Handwritten edits will not be accepted moving forward.

At Annual Review, any amendments to the EHCP should be annotated as follows:

Any proposed deletions **MUST** be shown by ~~strikethrough~~

Any proposed additions to the EHCP/Statement **MUST** be shown in **Bold**

EXAMPLE

Mary uses her voice all the time when she is communicating. She uses signs to communicate at home ~~and will imitate what she hears when language is simplified and directed to her.~~ Mary will switch between sign and spoken language according to who she is communicating with. **Mary is a natural communicator. She is always keen to share her news and is confident in her ability to do so. She will happily talk to people throughout the school and will repeat what she has said to ensure understanding. Mary can have conversations now and will ask questions to probe for more information.**

~~Mary is now joining signs together and is able to tell you simple things that have happened. Mary is constantly learning new signs and is observant of hand shape and position. She enjoys singing which helps bring a flow and fluency to her signing. Mary will now place time markers in her signing when retelling events and she understands and can use prepositions in sign. Her signed vocabulary is quickly expanding and she is visually very alert. ~~She has some recognisable spoken words to a familiar listener and lots of speech like vocalisation. She can follow simple verbal and familiar instructions when in context. Mary is a natural communicator and is keen to get her message across~~~~

N.B. Amendments are not to be made on the hours or the funding.

Advice on reviewing an EHCP that has not been amended

Consider the amendments to the EHCP made in the previous year/s during the discussion. Add amendments onto the latest Word version of the EHCP. Colour-coding can be used to identify each years review/amendments.

- The current EHCP should be available as a Word document so that this document can be annotated electronically and sent back to SENA with the recommended amendments.

During the Annual Review - SEN Regs 20.(7) Health and Social Care sections (Page 17)

Health and Social Care sections – optional depending upon current involvement



Refer to Annual Review guidance document – pages 11 and 12

Notes on the discussion for sections: C & G, D & H1/H2 (health and care sections)

Record:

- Where there is agreement
- Where there is disagreement
- Where the disagreement has been resolved
- Where the disagreement has not been resolved

•

- This section enables the recording of the conversation.
- Not all pupils will have health and/or social care needs, so should only be completed as appropriate.

During the Annual Review - SEN Regs 20.(7) Education sections (Page 17)

Optional for B and F – dependent on new needs and provision noted



Refer to Annual Review guidance document – pages 13, 14 and 15

- Not all pupils will have a change in their needs – this section should only be completed as appropriate.

Notes on needs and provision (Consider any new needs / provision required to meet outcomes)

It is helpful to record:

- Where there is agreement
- Where there is disagreement
- Where the disagreement has been resolved
- Where the disagreement has not been resolved

During the Annual Review meeting

Writing SMART outcomes

- We can think of writing a SMART outcome as a sandwich:



- In Leicestershire we include when an outcome will be achieved in the left-hand column of section E. However, when providing information back to SENA, this should be included. The top of the sandwich starts with the pupil's name.
- For the filling, include a skill that is measurable through either observation or assessment.
- Complete the sandwich with what this skill will enable them to do (what difference will this make).

Further information on writing good outcomes can be found on the SEN Assessment page under podcasts and also in the Annual Review framework guidance document on the same webpage.

During the Annual Review meeting

Personal budget (Page 20)

Optional to ask the question - but young people and parents of children who have EHC plans have the right to request a Personal Budget



Refer to Annual Review guidance document – page 16

- Information on any requests for a personal budget can be recorded

Section J – notes	
A personal budget (or a direct payment) that links any funding provided with specific outcomes of the EHC plan. This can either be from:	
<ul style="list-style-type: none"> - Education - Health - Social care (likely to be a direct payment) 	
Has a personal budget been discussed?	Yes/No.
Request information for a personal budget	Yes/No.
Education	Yes/No.
Health	Yes/No.
Care	Yes/No.

Following the Annual Review meeting

Sending off the documentation (Page 22 and 23)

- The last section of the documentation is a checklist of the different documents that are required to be sent to the LA
- This checklist / template is the Annual Review documentation that should be sent to SENA which sets out the recommendations on amendments agreed in the Annual Review meeting (SEN Reg 20.(7))
- Return of documents via AnyComms is the preferred method

To ensure the correct documentation is provided to SENA, please complete this checklist:

Have you attached the following with your submission to SENA?	
The annual review meeting notes (this template) – to be completed	Yes <input type="checkbox"/>
Advice and information sent out before the meeting:	
Child or Young person voice (attach One Page Profile if completed)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Parent/carer voice (attach One Page Profile if completed)	Yes <input type="checkbox"/> No <input type="checkbox"/>
From Educational setting (setting, school, college)	
Cost of provision map - required	Yes <input type="checkbox"/>
Record of Attendance - required	Yes <input type="checkbox"/>
Evidence of attainment and or progress made over the last 12 months (unless an early review) - required	Yes <input type="checkbox"/>
Individual Health Care Plan (if appropriate)	Yes <input type="checkbox"/> N/A <input type="checkbox"/>
Annotated EHCP – Word document (required)	Yes <input type="checkbox"/>
Other appropriate school advice / report (include tutors) (If appropriate)	Yes <input type="checkbox"/> N/A <input type="checkbox"/>
Health service advice / report (If appropriate)	Yes <input type="checkbox"/> N/A <input type="checkbox"/>
Local authority social care advice / report (If appropriate)	Yes <input type="checkbox"/> N/A <input type="checkbox"/>
Privately sourced provision reports (If appropriate)	Yes <input type="checkbox"/> N/A <input type="checkbox"/>
Final sign-off of documentation	
Annual Review documentation signed by Headteacher, SENDCo or <u>other</u> educational professional (will also accept photo signature pasted onto document, electronic signature but not a typed name) (Required)	Yes <input type="checkbox"/>

Guidance and useful resources



Leicestershire County Council

Search the site

Menu

Visit the main council website

Professional Resources

Home > Education and children > Special educational needs and disability > Support for schools

Assessment of SEN (SENA)

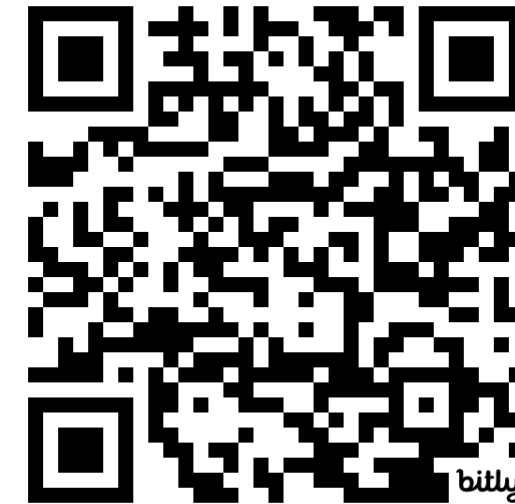
The Special Educational Needs Assessment (SENA) service carry out the statutory assessment and review of Education, Health and Care Plans (EHCP) for children and young people aged 0 – 25.

To find out more about what provision is expected for children with SEND in mainstream schools, and where to find additional support, please visit [Inclusive Practice Toolkit](#).

The service is responsible for writing Education Health and Care Plans (EHCP) if a statutory assessment is agreed, and will commission the identified provision to meet identified needs. The service can provide advice and guidance to families as well as educational settings around statutory duties.

Contact details

- SEN Assessment Service (SENA)
- 0116 305 6600
- Email address



Council for Disabled Children Annual Review training



Person-centred planning

[Helen Sanderson Associates](#)



[Person-Centred Planning meeting](#)



Capturing voice

[capture voice](#)

