



Annual Reviews of Education, Health and Care (EHC) Plans

RANi Need to Know Guides | EHCP Advisory sheet 5

Updated: April 2025

A full guide for parents, carers, and young people on your rights, the legal duties of the local authority, and what to expect at each stage

What Is an Annual Review?

An **Annual Review** is a **legal process** that must take place **at least once a year** to review a child or young person's **Education, Health and Care (EHC) plan**. Its purpose is to ensure that:

- The **provision** in the EHC plan is still appropriate
- The **educational or training outcomes** remain relevant
- The **school or setting** is still suitable
- Progress is being made towards the agreed outcomes

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It is also an opportunity to consider whether the EHC plan should be:

- **Continued without changes**
 - **Amended**
 - **Ceased** (brought to an end – only if legal criteria are met)
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When Should the Annual Review Happen?

- The **first review** must be held **within 12 months** of the date the EHC plan was first issued.
- Subsequent reviews must take place **within 12 months** of the **last review**.

This is a **statutory duty** under the **Children and Families Act 2014** and the **SEND Regulations 2014**.

For children under 5, reviews are often held more frequently (every 3–6 months) to reflect rapidly changing developmental needs.

Legal Duties and Timelines for the Annual Review

The process must follow a **strict legal timeline**. Here's how it breaks down:

Stage	Action	Deadline
1. Notification	The school/college must invite parents/young person, the local authority (LA), and professionals. They must also request updated advice.	At least 2 weeks before the review meeting
2. Review meeting	A meeting is held to discuss progress and whether changes are needed to the EHC plan.	By the 12-month anniversary of the last plan/final review

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3. Written report	The school or setting must send a report of the meeting to all attendees, including the LA.	Within 2 weeks of the meeting
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4. LA decision The local authority must decide whether to:

- keep the plan as is
- amend it
- or cease the plan
And notify the family of their decision in writing. | **Within 4 weeks of the meeting** |

So the **whole annual review process** must be completed **within 12 weeks** from the review meeting.

What Happens Before the Review Meeting?

The school or college **co-ordinates the review** and must:

- Contact the **local authority** to notify them of the review
- Request **written reports and advice** from:
 - Parents or young person
 - Teachers/SENCO
 - Therapists and other professionals
 - Social care/health professionals (if involved)
- Send out all reports to everyone **at least 2 weeks before the meeting**

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As a parent or young person, you should also be given the opportunity to:

- Express your views, wishes and feelings
 - Comment on progress
 - Suggest changes to outcomes or provision
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What Happens During the Review Meeting?

The review meeting will typically include:

- The child or young person (if appropriate)
- Their parents/carers or advocate
- School or college staff (usually the SENCO or Head of Year)
- A representative from the local authority (if they attend)
- Any relevant professionals (e.g., speech therapist, educational psychologist)

At the meeting, participants will discuss:

- Progress towards outcomes in the EHC plan
- Whether needs have changed
- Whether provision in **Section F** is still appropriate
- Whether the setting in **Section I** is still suitable
- Whether new outcomes are needed
- Whether the plan needs amending or should be ceased

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Professionals may also make **new recommendations**, especially if updated assessments or reports have been received.

What Happens After the Review Meeting?

The school or college must send a **written report** of the review to all participants and the local authority **within two weeks**. This report should include:

- Summary of what was discussed
 - Recommendations from attendees
 - Any proposed changes to the EHC plan
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The Local Authority's Decision

Within **four weeks of the meeting**, the local authority **must notify you in writing** of its decision to:

1. **Maintain** the EHC plan as it is
2. **Amend** the EHC plan
3. **Cease** the EHC plan

They must explain the reasons behind their decision.

If they decide to amend:

They must send you a **draft amended plan**, giving you **15 days** to:

- Comment on the proposed changes
- Request a **meeting to discuss** the changes

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- Request a **different school or college** in Section I
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Your Rights if You Disagree

If you disagree with the local authority's decision, you have the right to **appeal to the SEND Tribunal**. You can appeal:

- **If they refuse to amend the plan**
- **If they amend the plan but you disagree with the new content (e.g., in Sections B, F or I)**
- **If they decide to cease the plan**

You must first obtain a **mediation certificate**, unless your appeal is only about placement (Section I).

You have **2 months** from the decision letter OR **1 month** from the mediation certificate (whichever is later) to submit your appeal.

Early Annual Reviews

An annual review can also be **brought forward** if:

- There has been a **significant change in needs** or provision
- The child is **at risk of exclusion or not attending**
- A **placement is breaking down**
- The child is **transitioning** to a new setting (e.g., from primary to secondary)

This is known as an **early review**, and it follows the same process and legal timeline.

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Phase Transfer Reviews

When a child or young person is moving between key stages of education (e.g., from nursery to school, primary to secondary, or school to post-16), a **phase transfer review** must take place **in good time** to name the next setting in Section I.

Deadlines for phase transfer:

- **15 February** – for children moving to a new setting **in September** (e.g., from primary to secondary)
- **31 March** – for young people moving from school to **post-16 education**

The updated and finalised EHC plan must be issued by these dates with the **new school or college named**.

Your Checklist for the Annual Review

- Have you received at least **2 weeks' notice** of the review meeting?
 - Have you submitted your views in writing before the meeting?
 - Have you received copies of all reports at least 2 weeks before the meeting?
 - Did the meeting cover outcomes, needs, provision, and placement?
 - Have you received the **review report** within 2 weeks of the meeting?
 - Did the local authority write to you within 4 weeks with their decision?
 - Have you been given a chance to comment on proposed amendments?
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Support and Resources

You can get further support from:

- **RANi** – Help with advice, support and impartial information
- **Local Offer** - Help with advice, support and impartial information
- **SENDIASS** – Local impartial information and advice service for parents and young people www.iasmanchester.org
- **IPSEA** – Independent Provider of Special Education Advice: www.ipsea.org.uk
- **Contact** – A national charity supporting families with disabled children: www.contact.org.uk

If you'd like help preparing your request or understanding your appeal options, RANi can provide guidance and templates.

Remember:

Always keep a copy of all correspondence you send, along with proof of postage or delivery. If you send documents by post, we recommend using a **signed-for** service. If sending by email, request a **read receipt** if possible.

Get in Touch

If you need more information or have a question, we're here to help.

Email us: info@rani.org.uk

Please include:

- Your name
- Your child's name
- Your child's date of birth
- Your query

Or, if you prefer, you can fill out our online **contact form** and we'll get back to you as soon as possible.

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