



FAQ Annual Review Training September 2021

Do we still need parents/professional's initials in table if review meeting held on teams?

It would be best practice to initial and state that the meeting was held virtually.

Annual review paperwork is authorised by the headteacher/setting manager or SENCO and the LA will take this as confirmation that the meeting was held and that the persons identified as attending were present.

How will the documents be made available?

Paperwork will be circulated via LASL, CASL, School Portal, Local Offer, FE Network and can be emailed to schools.

What is the best way to return paperwork?

The documentation will include details for return of paperwork to the LA.

What are the timescales for circulation of documentation.

All paperwork and documentation to be circulated by week ending 8/10/21 for use from 11/10/21.

For an EHC plan that has just been agreed this month - for Y6 child. Plan includes targets etc for end of KS3 does that Annual Review have to be before Feb 2022 too?

An annual review will need to be held to identify the secondary school that the young person will be attending.

If annual reviews for phase transfer have to be done by 15th Feb does that then knock on the entire length of secondary school? Would that mean that all subsequent reviews are then held in autumn term? I can foresee that being an issue?

The phase transfer arrangements and dates are a statutory requirement as detailed in the SEND Code of Practice 2015. The initial review on transfer to secondary school would need to be held in the autumn term to meet the 12 month requirement, however in subsequent years it could be brought forward to the summer term as appropriate in order that the school could stagger reviews to prevent all reviews being held within the same term.

Thinking about transfer review meetings taking place by 15th Feb school places for Primary and Secondary are not allocated until after this date. With EHCP children are given priority to school places but they won't have been officially allocated by 15th Feb. How do we manage this?

Young people with EHCP's do not need to follow the schools admission process, the SEND Team will consult with schools and name the agreed school within the EHCP to meet the deadline of 15th February. Please see the SEND Admissions guidance for further information.

Is the expectation now that we have reviews back in school or via Teams? I am just thinking about having the child involved.

Reviews should be held in the safest and most convenient way for all those involved, this could be in person or virtually as appropriate.

I have a year 9 review in October. I am starting the process now. When will this new paperwork become available. Will I still be able to use the old paperwork?

Paperwork will be available for use week commencing 11/10/21 – any reviews prior to this date will be accepted on the existing paperwork. We appreciate that there will be a transitional period as the new paperwork is adopted.

What about the online aspect of the new EHCP process, is the paperwork going online as previously suggested?

We are continuing to develop the portal and will update you as to when it will go live. At this point all EHCP paperwork for parents will be online.

Do we need to provide extra documents e.g. provision maps, PIVATS

This is down to the individual setting if they feel that is appropriate.

Do we still have to provide minutes about all discussions as we need to review all sections of the EHCP and many of our parents do discuss these at length during the meeting.

Minutes are not an expectation or requirement.

Should schools change Health section if a health professional is not at the review

The health and care sections must only be updated based on updated information or reports from relevant professionals in health and care.

If a Y6 review is held early in the autumn term, we have issues with reviewing when they come to secondary as insufficient time has elapsed to genuinely comment on KS3 outcomes within timescales in Y7. How do you want us to manage this?

The initial review on transfer to secondary school would have to be held in the autumn term to meet the 12 month requirement, in subsequent years it could be brought forward to the summer term as appropriate in order that the school could stagger reviews to prevent all reviews being held within the same term

Should we be directly asking parents about the personal budget in every annual review meeting, even if one hasn't been in place previously?

Yes – it is a requirement within the Code of Practice to discuss the option of a personal budget at each review.

Who is responsible for checking with parents that they fully understand the information in the EHCP when Family Meetings are not set up routinely?

Parents can talk it through with schools/EHCP Coordinators or professionals involved in the assessment process.

What is the deadline for Year 11 reviews?

Year 11 reviews should take place in the autumn term so that the EHCP can be amended to reflect transfer to Post 16. It will not be possible in the majority of cases to name the provider prior to the 31 March, therefore the plan will be amended to reflect the type of provision that the young person will be accessing.

Previously professional advice at AR was either attendance at the meeting or a report, unless at a key transition point. Has this changed?

No – this remains the advice.

In all Year 9, Year 10 and Year 11 reviews (for one student) we would invite Post 16 setting representatives each time?

Post 16 setting should be invited as appropriate – good practice would be to invite to the Year 10 and 11 review to enable key staff to be involved in transition discussions.

Do you have any documents that outline the whole process for parents from EHCP applications through to the panel etc.

Cumbria SEND has developed a number of guidance documents for relevant aspects of SEN Support and the EHCP process and they will be available for access from the Local Offer.

When will the information on the new approach to specialist placements be shared?

This is in the process of being finalised and will be shared imminently.