EHCP annual review preparation checklist

For children, young people and families in England

Use this checklist to prepare your views, organise evidence and record the next steps. You do not need every document or a paid report to take part. The annual review is a process; the meeting gathers recommendations, and the local authority makes the formal decision.

Before the meeting

Child or young person and school or setting

_____

Meeting date and time

_____

Current EHCP date and previous review date

_____

Organiser and local authority contact

_____

☐ Ask how the child or young person wants to take part: in person, for part of the meeting, with a supporter, or through pictures, speech, signing or another communication method.

☐ Ask for any access arrangements you need, such as an interpreter, accessible papers, breaks or a remote meeting.

☐ Check the invitation and review advice have been circulated at least two weeks before the meeting. If papers are missing or late, ask for them and explain what you need to participate properly.

☐ Read the current plan and choose your main questions. Bring relevant progress reports, provision records and examples from home or the setting. Note any important missing evidence.

The child or young person says

Use their own words or preferred communication. Label an adult interpretation or observation clearly, rather than presenting it as a direct quote.

What is going well and what matters to me

_____

_____

What is difficult and what helps

_____

_____

What I would like to change or work towards

_____

_____

After compulsory school age, the relevant SEND decision-making rights normally belong to the young person. Ask how they want to be supported; do not assume a parent automatically makes every decision.

Evidence and discussion

Compare what the plan specifies with what actually happened. Describe strengths and progress as well as gaps. A short dated example is more useful than a large bundle without explanation.

Plan section and support specified	What was delivered or missing	Evidence and date

Questions to cover

☐ Review needs, progress towards outcomes and whether the outcomes and provision still fit. Explain what has changed and what the evidence shows.

☐ For each proposed change, identify the plan section, the wording or support needed, and the evidence behind it. For Section F, ask for clear provision, including who delivers it and how often, for how long and in what group size where relevant.

☐ Discuss relevant health and social care needs as well as education. Provision that educates or trains belongs in Section F even if a health or social care professional delivers it.

☐ From Year 9, discuss preparation for adulthood: education or work, independent living, health and participation in the community.

☐ Ask the report to record recommendations, differences of view, actions, owners and dates. Agreement in the meeting does not itself amend the EHCP.

Priorities and next actions

My priority change or question	Evidence or person to ask	Next action and owner

If support already specified in the plan is missing, raise that with the local authority now. You do not have to wait for the next annual review to report non-delivery.

After the meeting

Record the meeting date and track the written report, the council decision and any amendment process separately. Use the council deadlines below to plan your next action.

Within two weeks of the meeting. The review report must be sent to everyone invited. Read it and promptly identify material inaccuracies or missing views.

Report received

_____

Within four weeks of the meeting. The local authority must notify whether it will maintain, amend or cease the plan. If amending after review, it must also provide the proposed amendments, not just an intention to amend.

Decision and proposals received

_____

If amendments are proposed. You must have at least 15 calendar days to make representations. Check the existing plan, amendment notice and supporting evidence; record the actual response deadline.

My response deadline

_____

Final amended plan. Where it proceeds with amendments, the council must issue the final plan as soon as practicable and within eight weeks of the amendment notice. Following annual review, the timetable requires completion within 12 weeks of the meeting.

Final plan due and received

_____

☐ Check the final plan and who will deliver the specified provision. Keep the decision letter, plan, review report, evidence and proof of what you sent.

☐ If you disagree with an appealable decision, read its appeal and mediation information promptly. The usual appeal deadline is two months from the decision letter or one month from the mediation certificate, whichever is later. Mediation advice is normally required; an appeal only about Section I has an exception. Check the current GOV.UK instructions.

☐ Ask your local SEND Information, Advice and Support Service (SENDIASS) for free support through your council's Local Offer. The council remains responsible for its statutory process; paid support is optional.

The first review must be completed within 12 months of the original plan, and later reviews within 12 months of the previous review. Phase-transfer deadlines can require earlier action. For children under five, the Code recommends considering reviews every three to six months.

My next action, who is responsible and the date

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Official sources

SEND Regulations 2014, regulations 19 to 22

SEND Code of Practice, paragraphs 9.166 to 9.198

R (L) v Devon County Council [2022] EWHC 493 (Admin), paragraphs 79 to 87

GOV.UK guide to EHC plan appeals

Prepared 18 October 2026. General information about the current English system. Different arrangements apply in Wales. Keep a private copy of your completed notes and share only the information needed for your review.