

Annual Review Preparation Checklist

Template — Otio Academy Parent Zone

Use this checklist to prepare for your child's EHCP annual review. Tick off each item as you complete it.

Child's name: [Full name]

Review date: [Date]

Review type: Standard annual review Year 9+ transition review Emergency review

4 Weeks Before the Review

- Check the meeting date, time, and venue — request a change if it does not work for you
 - Confirm who has been invited (you can request that specific professionals attend)
 - Request copies of all professional reports that will be discussed at the review
 - Invite anyone you would like to support you (advocate, family member, IASS adviser)
 - If your child has views to share, help them prepare (written, drawn, or recorded)
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2 Weeks Before the Review

- Read through the current EHCP — note anything that needs updating
 - Review each outcome in Section E — is your child making progress towards these?
 - Review the provision in Section F — is everything listed actually being delivered?
 - Write down your key points (use the prompts below)
 - Gather any new evidence (recent reports, assessments, letters from professionals)
 - Prepare a brief written update on your child's progress and difficulties at home
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Key Points to Prepare

Progress against outcomes

For each outcome in Section E, note:

Outcome	Progress	Evidence	Action needed
[Outcome 1]	[On track / Behind / Achieved]	[What shows this]	[Change needed?]
[Outcome 2]	[On track / Behind / Achieved]	[What shows this]	[Change needed?]
[Outcome 3]	[On track / Behind / Achieved]	[What shows this]	[Change needed?]

Provision check

For each item in Section F, note:

Provision listed	Being delivered?	Hours correct?	Quality adequate?
[Provision 1]	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partially	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
[Provision 2]	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partially	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
[Provision 3]	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partially	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Changes to request

- [e.g. "Increase speech therapy from 1 to 2 hours per week"]
 - [e.g. "Add occupational therapy to Section F"]
 - [e.g. "Update Section I to name Otio Academy as educational setting"]
 - [e.g. "Amend outcomes to reflect current levels and aspirations"]
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At the Review Meeting

- Take your notes and any new evidence
 - Ask for a copy of the meeting notes before they are finalised
 - Ensure your views and your child's views are accurately recorded
 - Confirm what changes (if any) will be made to the EHCP
 - Ask for the timeline — the LA has 4 weeks to decide whether to amend
 - If you disagree with any decisions, say so clearly and ask for it to be recorded
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After the Review

- Check you receive the LA's decision within 4 weeks
 - If the EHCP is being amended, check the draft amendment carefully
 - You have 15 days to comment on any proposed amendments
 - If you disagree with the LA's decision not to amend, you can appeal to the SEND Tribunal
 - Keep copies of all documents and correspondence
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For Year 9+ Transition Reviews

- Discuss post-16 education options (sixth form, college, apprenticeships, online learning)
 - Consider preparation for adulthood outcomes (employment, independent living, health, community)
 - Check whether the EHCP needs to be updated to include transition planning
 - Discuss whether the young person wants to be involved in decision-making directly
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This template is provided by Otio Academy for informational purposes only and does not constitute legal advice. For free support with annual reviews, contact your local IASS.

www.otioacademy.com/parent-zone/ehcp