

# Advanced EHCP Parent Action Pack

An editable planning workbook for families preparing evidence, discussing an Education, Health and Care plan, and following through after meetings in England.

Special Education Path | Version 1 | 30 October 2026

## What this pack helps you do

Turn a folder of reports and messages into a clear set of needs, evidence, questions and actions. Start with the worksheet that matches your next task; you do not need to complete the whole pack.

- Map an educational concern to evidence and a question for the team.
- Compare professional recommendations without assuming one report automatically decides the outcome.
- Track the provision specified in a plan and separate confirmed delivery from observations that need checking.
- Prepare a focused meeting agenda and keep agreed actions visible.

## Choose your starting point

| Your next task                               | Start on page |
|----------------------------------------------|---------------|
| Organise reports and evidence                | 2 to 7        |
| Clarify or track provision                   | 8 to 10       |
| Prepare and record a meeting                 | 11 to 12      |
| Adapt a request letter                       | 13 to 15      |
| Prepare an annual review or track next steps | 16 to 18      |

Scope: England only. This is an organisational resource, not individual legal, educational, medical or clinical advice. It does not guarantee an assessment, an EHCP, particular provision or an appeal outcome. Check official guidance and your own decision letters. The free resources on Special Education Path remain available.

Use a learner alias in working drafts. Store reports and completed worksheets privately. Use the DOCX to edit or duplicate pages; use the PDF to print. The PDF is a printable copy, not an interactive form.

# Evidence mapping worked example

Use this fictional example to see how a concern becomes a specific discussion point. It does not establish a legal breach or entitlement.

| Item                | Example                                                                                                                                                |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Concern             | Learner A struggles to begin classroom tasks with several spoken steps.                                                                                |
| What is observed    | Teacher review records repeated adult prompts. Parent observes distress around homework instructions. These observations come from different settings. |
| Evidence            | E01 school review, page 2; E02 dated parent observations.                                                                                              |
| Educational effect  | Learner completes less independent work and says they feel lost at the start of tasks.                                                                 |
| Existing support    | Teacher breaks tasks into steps. Frequency and consistency are not clear from the records.                                                             |
| Question to resolve | What level of structured instruction and prompting is needed, and how will the school measure whether it helps?                                        |
| Evidence gap        | No shared record of how often the current strategy was used or its effect.                                                                             |
| Requested next step | Agree a short, dated review of current support and seek relevant professional advice if the needs remain unclear.                                      |

## What makes this useful

The record links the concern to evidence, names what is unknown and asks a question the team can answer. Avoid turning an observation into a clinical conclusion. A diagnosis may be relevant, but the educational effect and support needed still need to be described.

### A similar question you want your own evidence to answer

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# Compare reports worked example

Compare what each report actually assessed and recommended. Differences may reflect dates, settings, methods or the question each professional was asked.

| Comparison point         | Report A                                       | Report B                                                 |
|--------------------------|------------------------------------------------|----------------------------------------------------------|
| Purpose and date         | School review, 2 October; classroom access     | Specialist report, 12 October; communication assessment  |
| Evidence used            | Teacher observations and work samples          | Assessment, observation and discussion with family       |
| Recommendation           | Use short instructions and check understanding | Structured language support with a specified review plan |
| What needs clarification | Who checks understanding and when?             | How does the recommendation apply across lessons?        |
| Question for the team    | What support is already in place?              | How should both sets of evidence inform the plan?        |

## Before commissioning more evidence

Identify the unanswered question first. Ask whether existing school or statutory assessment advice can answer it, and what an additional professional would assess. Paying privately does not guarantee the recommendation will be adopted. Check relevant qualifications, scope, costs and timescales before agreeing work.

### Which question remains unanswered in your own reports

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# Map needs to provision

In an England EHCP, Section B describes special educational needs and Section F specifies special educational provision. This sheet helps you ask whether the connection is clear; it does not draft legally sufficient provision for every case.

## Fictional example for discussion

| Point to check           | Example question                                                               |
|--------------------------|--------------------------------------------------------------------------------|
| Identified need          | Which assessed communication difficulty is this provision intended to address? |
| Activity or intervention | What will the staff member actually do?                                        |
| Frequency and duration   | How often, for how long and over what period?                                  |
| Delivery and expertise   | Who delivers it and what relevant training or specialist input is needed?      |
| Setting and access       | Where will it happen and how will it support participation?                    |
| Review and evidence      | How will the team know whether it is helping, and when will it review it?      |

For example, "support as needed" may leave practical questions unanswered. Ask what is intended and what evidence supports it. A specific number of hours is not automatically right for a learner; appropriate provision should follow the assessed needs and relevant evidence.

### A phrase in your plan that you want clarified

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### The evidence or report recommendation connected to it

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