



SPECIAL EDUCATION PATH

EHCP Evidence Organiser

& Annual Review Preparation Pack

A free, practical workbook for parents, carers and young people in England

ENGLAND ONLY

This pack uses England-specific SEND and EHCP terminology. Scotland, Wales and Northern Ireland have different legal frameworks and terminology.

Child / young person	
Prepared by	
Annual review date	
Local authority	
School / setting	

Free resource from specialeducationpath.com

Reviewed 12 September 2026

Before you start

Use this pack to organise evidence, prepare for an annual review, and record what happens afterwards. It does not replace independent legal advice or your local SENDIASS service.

Important

Do not send the whole workbook automatically. Share only the pages and evidence that are relevant. Store sensitive documents securely and avoid emailing personal or health information unless you are comfortable with the method being used.

Key statutory checkpoints used in this pack

- An EHC plan must be reviewed at least every 12 months.
- For a school/college annual review, advice and information must be circulated at least 2 weeks before the meeting.
- The written review report must be prepared within 2 weeks of the review meeting and sent to the relevant people.
- The local authority must notify the parent or young person of its decision to maintain, amend or cease the plan within 4 weeks of the review meeting.
- If amendments are proposed after a review, the parent or young person must have at least 15 days to make representations and request a meeting; the final amended plan must then be issued within 8 weeks of the amendment notice if the authority decides to amend.
- From Year 9 onwards, the review must consider preparation for adulthood and independent living.

Source basis: Special Educational Needs and Disability Regulations 2014, especially regulations 20-22, and the SEND Code of Practice: 0 to 25 years. Always check current guidance for changes.

How to use the workbook

1. Start with the snapshot and priorities pages so everyone can see what matters most.
2. Add evidence to the tracker as you receive it. Give each document a short reference, for example EP-01 or SCHOOL-03.
3. Map each important need to the provision currently written in the EHCP and to the evidence supporting any requested change.
4. Use the annual review pages to prepare your contribution, questions and requested amendments before the meeting.
5. After the meeting, use the decision tracker to record statutory deadlines and follow up promptly if paperwork is late.

Contents

Print only the pages you need, or type directly into the editable Word version.

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Child or young person snapshot

A one-page overview for meetings, new professionals or anyone who needs the essentials quickly.

Name / preferred name	
Date of birth	
Year group / course	
School / setting	
EHCP issue date	
Last annual review	
Next annual review due	
Primary contact at setting	
Local authority case officer	

In one sentence: what is most important right now?

Communication / access needs for meetings

Strengths, aspirations and priorities

Keep the child or young person at the centre. Record what is going well as well as what needs to change.

Strengths and interests

Aspirations - what matters for the future?

Top three priorities for the next 12 months

Priority	Why it matters	What success would look like

EHCP section check

Use this as a quick review of the current plan. Note anything missing, out of date, vague or inconsistent.

Section	What it covers	Up to date?	Notes / change needed
A	Views, interests and aspirations	☐ Yes ☐ No	
B	Special educational needs	☐ Yes ☐ No	
C	Health needs related to SEN	☐ Yes ☐ No	
D	Social care needs related to SEN/disability	☐ Yes ☐ No	
E	Outcomes	☐ Yes ☐ No	
F	Special educational provision	☐ Yes ☐ No	
G	Health provision	☐ Yes ☐ No	
H1/H2	Social care provision	☐ Yes ☐ No	
I	Placement	☐ Yes ☐ No	
J	Personal budget	☐ Yes ☐ No	
K	Advice and information	☐ Yes ☐ No	

Evidence checklist

Not every family needs every type of evidence. Tick what exists, then decide what is relevant to the issue you want the review to address.

☐ Current EHCP	☐ Previous annual review report
☐ School progress / attainment information	☐ SEN Support plans / provision maps
☐ Attendance or reduced timetable information	☐ Behaviour / regulation records (where relevant)
☐ Educational psychologist report	☐ Speech and language therapy report
☐ Occupational therapy report	☐ Physiotherapy report
☐ CAMHS / paediatric / clinical reports	☐ Social care assessment or plan
☐ School observations / teacher reports	☐ Parent / carer statement
☐ Child or young person views	☐ Home-school communication records
☐ Examples of work / learning evidence	☐ Records showing provision delivered or missed
☐ Transition information	☐ Other specialist reports

What evidence is missing or needs updating?

Evidence master tracker

Give each document a short reference so you can cite it clearly in emails and at the annual review.

Ref	Document / evidence	Author / source	Date	What it supports	Shared?

Tip

Use neutral labels such as EP-01, SALT-02, SCHOOL-03 and PARENT-01. Keep originals in a secure folder and work from copies.

Professional contacts

Keep a single list of the people involved and what they are responsible for.

Name	Role / service	Organisation	Email / phone	What they provide

Needs - evidence - provision map

This is one of the most useful preparation pages. Link the need in Section B to evidence and to the provision in Section F.

What to look for

Section F should be clear enough for everyone to understand what must be delivered. Where provision is vague, note the evidence that supports a more specific description.

Need (Section B)	Evidence ref	Current provision (Section F)	Problem / gap	Requested change

Section F provision tracker

Use this to compare what the EHCP says should happen with what is actually being delivered.

Provision written in Section F	Who should deliver it	Frequency / duration	What happened	Evidence / date	Action needed

Important

This tracker records facts; it does not decide whether a legal breach has occurred. If provision is repeatedly not being secured, consider contacting your local SENDIASS service for independent information and advice.

Outcome and progress tracker

Review whether the outcomes in Section E are still appropriate and whether progress is being supported by the provision in the plan.

Outcome	Starting point	Progress / evidence	Still appropriate?	Change needed

New or revised outcomes to discuss

School communication log

Keep communication factual. Record key conversations and follow up important verbal discussions in writing.

Date	Who	Method	Topic / concern	What was agreed	Follow-up date

Issue / incident evidence log

Use this only when it helps demonstrate a pattern, impact or unmet need. Avoid collecting more sensitive information than necessary.

Date	What happened	Impact on child / young person	Relevant EHCP need / provision	Evidence	Action taken

Annual review preparation timeline

Use the statutory checkpoints as anchors, then add your local dates.

Checkpoint	What to do	Your date / status
6-8 weeks before	Read the current EHCP. Update evidence tracker. Ask when parent / young person views are due.	[]
Around 4 weeks before	Request updated reports if needed. Draft your priorities and requested changes.	[]
At least 2 weeks before	Check the meeting date and that relevant advice/information has been circulated. Read it and note questions.	[]
Meeting day	Bring your priorities, evidence references and requested amendments. Ask for disagreements to be accurately recorded.	[]
Within 2 weeks after	Expect the written review report to be prepared and shared with the relevant people.	[]
Within 4 weeks after	The local authority must notify the parent or young person whether it will maintain, amend or cease the plan.	[]
If amendment notice arrives	You must be given at least 15 days to make representations and may request a meeting with the local authority.	[]
If LA decides to amend	A final amended plan must be issued as soon as practicable and within 8 weeks of the amendment notice.	[]

Parent / carer contribution planner

Draft your contribution in plain language. Focus on changes since the last review, impact, evidence and what you want to happen next.

What has gone well?

What has changed since the last review?

What is not working or is no longer sufficient?

The three most important changes I am requesting

Requested change	Why	Evidence ref

Child or young person voice

Use the communication method that works best for the child or young person.
This page can be completed with words, symbols, drawings or supported communication.

Things I like / things that are going well

Things that are hard or I want help with

What I want adults to understand

What I want to happen next

Questions for the annual review

Choose the questions that matter most. Leave space to record the answer and any follow-up.

Which needs in Section B have changed or need clearer wording?	Notes:
Is every important need matched to provision in Section F?	Notes:
Who is responsible for each part of provision, and how often should it happen?	Notes:
What evidence shows progress towards each outcome?	Notes:
Are any outcomes no longer appropriate or measurable?	Notes:
Are health or social care needs/provision missing or out of date?	Notes:
Is the current placement still appropriate?	Notes:
What transition or preparation-for-adulthood work is needed?	Notes:
Which amendments will be recommended to the local authority?	Notes:
Who will complete each agreed action, and by when?	Notes:

Annual review meeting notes and actions

Record decisions and recommendations, not every word. If people disagree, note the different positions accurately.

Meeting date	
Chair / lead	
People attending	
Reports considered	

Key discussion and recommendations

Action log

Action	Owner	Deadline	Completed

Requested amendments tracker

Use this after the meeting to compare the current wording with what you asked to change.

EHCP section	Current wording / issue	Requested wording or change	Evidence ref	LA response

Tip

Be specific. Instead of only saying “increase support”, identify the need, the exact provision you say is required, and the evidence supporting the request.

After-review decision and deadline tracker

Record what the local authority decides and the dates that matter. Keep the decision letter and any amendment notice together with your evidence file.

Annual review meeting date	
Review report received	
4-week LA decision deadline	
Decision received	☐ Maintain ☐ Amend ☐ Cease
Amendment notice date (if applicable)	
15-day response deadline	
Final amended plan deadline (if applicable)	

Follow-up / next action

Date	Action taken	Who contacted	Response / next deadline

If you disagree

Decision letters should explain relevant appeal rights, time limits, mediation information and sources of advice. Consider independent support from your local SENDIASS service or a qualified adviser where appropriate.

Year 9+ preparing for adulthood

From Year 9 onwards, the annual review must consider provision needed to support preparation for adulthood and independent living.

Area	Current goal	Support needed	Next action / owner
Education / employment Courses, qualifications, work experience, careers support, supported employment			
Independent living Daily living skills, travel, housing, managing money, personal assistance			
Community inclusion Friends, relationships, activities, transport, participation			
Health Understanding health needs, moving to adult services, managing appointments and support			

Key contacts and official sources

Add local contacts here. The official links below are the main national sources used to prepare this workbook.

Your local contacts

Local SENDIASS service	
Local authority SEND team	
School / setting SENCO	
Case officer	
Other adviser / advocate	

Official sources checked 12 September 2026

SEND Code of Practice: 0 to 25 years - GOV.UK

[gov.uk/government/publications/send-code-of-practice-0-to-25](https://www.gov.uk/government/publications/send-code-of-practice-0-to-25)

Special Educational Needs and Disability Regulations 2014 - legislation.gov.uk

[legislation.gov.uk/uksi/2014/1530/contents](https://www.legislation.gov.uk/uksi/2014/1530/contents)

Education, health and care plans statistics - GOV.UK Explore Education Statistics

explore-education-statistics.service.gov.uk/find-statistics/education-health-and-care-plans

Special Education Path England guides

specialeducationpath.com/uk/england/

Keep this pack current

SEND law and policy can change. Before relying on a deadline or process, check the current official source and your latest local authority correspondence.

Extra notes

Special Education Path

specialeducationpath.com