Education, Health and Care Plan (EHCP) Review Process for Requesting Health Advice

NHS Humber and North Yorkshire Integrated Care Board

October 2025

Ratified: March 2026

Review due: October 2026

Introduction

NHS Humber and North Yorkshire Integrated Care Board (HNY ICB) collates themes from appeals and tribunals that are extended to health. One of the most common themes for an appeal being extended to health, is health advice not being requested during an EHCP review. This would then cause the health section of an EHCP to be out of date.

Similar themes have also been collated during local area SEND inspections HNY ICB have been involved in.

This documented has been created to support organisers of EHCP review meetings with the process for requesting health advice for the review meeting.

Responsibilities

Local Authority: The Local Authority has overall responsibility for the EHCP, with statutory timescales to adhere to as set out in SEND legislation.

Section 9.174 of the CoP states: The local authority should provide a list of children and young people who will require a review of their EHC plan that term to all headteachers and principals of schools, colleges and other institutions attended by children or young people with EHC plans, at least two weeks before the start of each term.

Education Providers: While Local Authorities (LAs) are legally responsible for ensuring an EHCP is reviewed as a minimum every 12 months, LAs usually delegate the responsibility for arranging EHCP review meetings to education settings. This includes organising the review meeting, requesting updated advice and circulating reports to meeting attendees. The organiser of the EHCP review meeting should ask the young person, parent or carer to complete the medical questionnaire prior to the meeting, to support the organiser in knowing where to request health advice from.

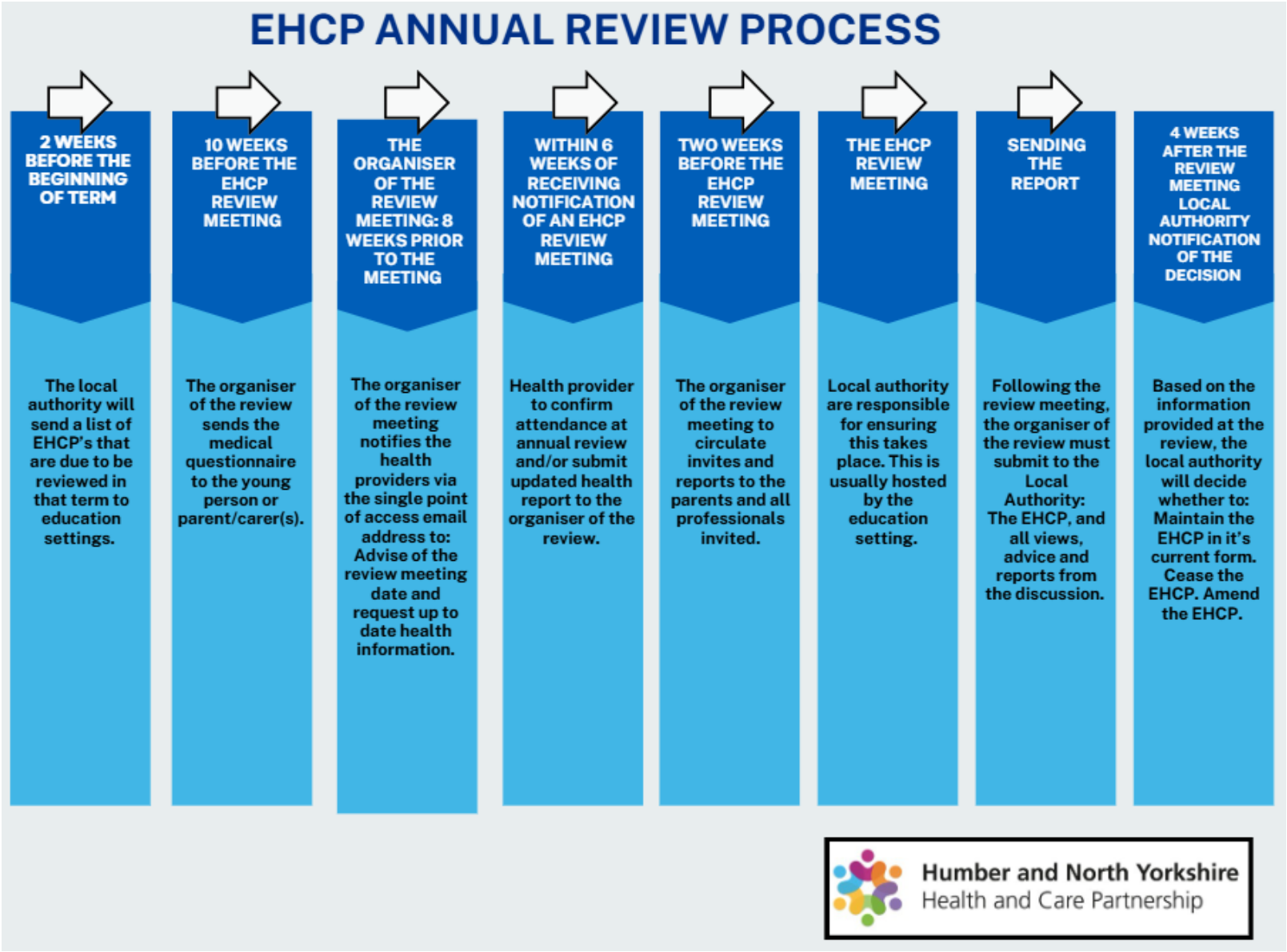
Where a child or young person is not on roll in an education setting, such as the child or young person being electively home educated, the Local Authority will conduct the EHCP review.

Young Person and/or Parents/Carers: To complete the medical questionnaire and return to the education setting, to inform the setting about the current health services involved in the CYP's care and enable the setting to request health advice from the most appropriate ICB commissioned service. This enables current health reports to be submitted and to be utilised in the EHCP review.

ICB Commissioned Services: Upon receiving a request for information for an EHCP review meeting, services must actively contribute to EHCP reviews and provide relevant information and insights into the CYPs health needs, outcomes, and health provision.

Process

The below process incorporates statutory timescales for an EHCP review, as well as suggested timescales for requesting updated health advice prior to the review meeting. This helps to ensure requests are sent and completed in a timely manner, enabling the LA to meet its statutory duties of completing EHCP reviews:


EHCP ANNUAL REVIEW PROCESS
2 WEEKS BEFORE THE BEGINNING OF TERM
The local authority will send a list of EHCP's that are due to be reviewed in that term to education settings.
10 WEEKS BEFORE THE EHCP REVIEW MEETING
The organiser of the review sends the medical questionnaire to the young person or parent/carer(s).
THE ORGANISER OF THE REVIEW MEETING: 8 WEEKS PRIOR TO THE MEETING
The organiser of the review meeting notifies the health providers via the single point of access email address to: Advise of the review meeting date and request up to date health information.
WITHIN 6 WEEKS OF RECEIVING NOTIFICATION OF AN EHCP REVIEW MEETING
Health provider to confirm attendance at annual review and/or submit updated health report to the organiser of the review.
TWO WEEKS BEFORE THE EHCP REVIEW MEETING
The organiser of the review meeting to circulate invites and reports to the parents and all professionals invited.
THE EHCP REVIEW MEETING
Local authority are responsible for ensuring this takes place. This is usually hosted by the education setting.
SENDING THE REPORT
Following the review meeting, the organiser of the review must submit to the Local Authority: The EHCP, and all views, advice and reports from the discussion.
4 WEEKS AFTER THE REVIEW MEETING LOCAL AUTHORITY NOTIFICATION OF THE DECISION
Based on the information provided at the review, the local authority will decide whether to: Maintain the EHCP in it's current form. Cease the EHCP. Amend the EHCP.
Humber and North Yorkshire
Health and Care Partnership

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Annual review
flowchart August 20

Medical Questionnaire: The purpose of the medical questionnaire is to support the organiser of the review meeting with knowing which health services are involved in the CYPs health. Once the questionnaire has been completed the organiser of the annual review can contact the health services identified to request up to date information. To support with capacity of completing health advice requests, it is recommended that the medical questionnaire is sent out to young people and/or parent/carer(s) ten weeks prior to the date of the review meeting and completed within 2 weeks to allow for time to send requests and received health information before the date of the review.

Requesting Health Information: Once the medical questionnaire is completed organisers of the annual review should use the contact information for local health services (pathways for health services are listed on the Local Offer) to send a request for up-to-date health information to each health service that has been identified. We advise to not send requests to individual practitioners and to contact the service directly, this is to prevent any potential delays if sent directly to a practitioner e.g. if practitioner on annual leave, sick leave, parental leave etc.

Timeline for Requests: To support health practitioners' capacity with completing health advice requests alongside their clinical caseload, it is recommended to send health advice requests to health services eight weeks prior to the date of the review meeting. This gives health practitioners six weeks to complete and return the health advice so that the organiser can meet the legal timescale of circulating reports prior to the review meeting.

CYP has been Discharged from a Health Service: When a CYP has been discharged from a health service, they and their family are provided with a discharge letter. A copy of the discharge letter can be provided upon request for the review meeting. The discharge from the health service will need updating within the needs and provision of the EHCP.

How to update Section C and G

Information written into Section C and G of the EHCP must come from an NHS Integrated Care Board (ICB) Commissioned Health Service.

In Section C of the EHCP, consideration should be given to any new diagnoses or ongoing investigations, as well as amendments to ongoing health conditions in the current EHCP. Where health advice is written in sections B and F, the following can be written in Section C "Advice provided by SALT/OT/CAMHS/Physiotherapy identifies educational needs and is written in Sections B and F.

Regarding Section G, provisions should be made to meet the needs outlined in Section C. Any additional health provisions require agreement from the ICB. The SEND Code of Practice (9.71, 2015) states 'health care provision specified in section G of the EHC plan must be agreed by the Clinical Commissioning Group (CCG) (or where relevant, NHS England) and any health care provision should be agreed in time to be included in the draft EHC plan sent to the child's parent or to the young person."

Conclusion

These guidelines adhere to the principles outlined in Part 3 of the Children's and Families Act (2014), The SEND Regulations (2014) and the SEND Code of Practice (2015) and aims to ensure EHCP reviews are conducted effectively and in the best interests of children and young people with special educational needs and disabilities, across the six places of NHS Humber and North Yorkshire Integrated Care Board.

References

- Children and Families Act 2014, C.3. Available at: Children and Families Act 2014 [Accessed 01 September 2025]
- SEND Code of Practice: 0 to 25 years (2014) Available at: SEND code of practice: 0 to 25 years - GOV.UK [Accessed 27 November 2025]
- The Special Educational Needs and Disability Regulations (2014) Available at: The Special Educational Needs and Disability Regulations 2014 [Accessed 01 September 2025]

- Department for Education and Department of Health (2015) *Special educational needs and disability code of practice: 0 to 25 years*. Available at: SEND_Code_of_Practice_January_2015.pdf. [Accessed 01 September 2025]