

SEND SERVICE - EHC ASSESSMENT AND PLANNING PROCESSES FOR 16-25 YEAR OLDS

This document lays out the processes and procedures for managing referrals to the EHC Assessment and Planning Pathway. It identifies who is responsible for each stage of the process.

REFERRAL FORM RECEIVED AND CHECKED	
What do we do? <ul style="list-style-type: none"> • Suitability of referral discussed with Post 16 Hub • Agree submission of referral 	Who does it? Plan Coordinator
<ul style="list-style-type: none"> • Check contents of referral against EHC Referral Checklist (CO) that all signatures and evidence are attached. (EHC Referral Form, Pack of evidence, All about me, Medical Questionnaire) 	Assistant Plan Coordinator
IF REFERRAL INCOMPLETE	
What do we do? <ul style="list-style-type: none"> • Assistant Plan Coordinator discusses referral with referrer • If missing documentation not received following discussion, referral returned to referrer 	Who does it? Assistant Plan Coordinator SENDS Admin
IF REFERRAL COMPLETE: Record & acknowledge referral	
What do we do? <ul style="list-style-type: none"> • Stamp in with date. • Send letter of acknowledgement to parent/carer, cc to referrer (Letter 1) enclose parental leaflet (EHC) • Identify young person (YP) on One system V4 (Name search) cross reference dob/school. Open YP persons details & create an SEN involvement. If there is previous involvement combine the information. • Arrange Post 16 referral panel meeting • Prepare for Post 16 referral panel Meeting: referral panel decision sheet, list evidence, create file • Run One V4 Report (Student Demographics) to gather education info • Request involvement info from relevant professionals if appropriate. 	Who does it? SENDS Admin

EHC REFERRALS PANEL MEETING	
What do we do? <ul style="list-style-type: none"> • Consider and decide on what happens to referral: • Check referral meets severity and process criteria, • Identify joint Case Management - Plan Coordinator, Assistant Plan Coordinator. • Referral panel must identify the reasons for any “no” decisions 	Who does it? EHC Referrals Group
<ul style="list-style-type: none"> • Record minutes of meeting, completing EHC Referrals Panel Decision Sheet 	SENDS Admin

FOLLOW-UP TO EHC REFERRALS PANEL MEETING If Decision "No" to referral because doesn't meet criteria	
What do we do? <ul style="list-style-type: none"> • Update spreadsheet, One system 	Who does it? SENDS Admin
<ul style="list-style-type: none"> • Send letter to parents with reasons for “No”, cc to referrer, post 16 setting if different than referrer • Record on One system 	Assistant Plan Coordinator

FOLLOW-UP TO EHC REFERRALS PANEL MEETING If Decision "Yes" to referral	
What do we do? <ul style="list-style-type: none"> • Update spreadsheet • Set up individual's EHC Plan Document saved to EHC Working Documents in G:/Docs/A+I, using template A-K • Register on One system 	Who does it? SENDS Admin
	Assistant Plan Coordinator

INFORMATION GATHERING	
What do we do? <ul style="list-style-type: none"> • Notify young person, parents/ carers of EHC assessment, cc post 16 setting and relevant professionals • Contact post 16 setting to confirm assessment information sent with referral is correct • Contact medial professionals (if appropriate) for updated information • Contact social care (if appropriate) for updated information • Reports to be received electronically where possible and forwarded to Plan Coordinators/Assistant Plan Coordinators via email • SEND admin to chase any advice not received within prescribed timescales 	Who does it? Plan Coordinator/ Assistant Plan Coordinator

COMPLETING THE EHC NEEDS ASSESSMENT PROCESS	
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What do we do?	Who does it?
<ul style="list-style-type: none"> Identify that all advice has been received and assessment is complete and pass case to Plan Coordinator 	Assistant Plan Coordinator

PRODUCING THE SUMMARY ASSESSMENT	
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What do we do?	Who does it?
<ul style="list-style-type: none"> Collate summary assessment from reports complete draft Summary Assessment Summary and V10 (if available) made available for consideration at SEND Post 16 Panel 	Plan Co-ordinator

Post 16 EHCP PANEL	
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What do we do?	Who does it?
<ul style="list-style-type: none"> Agree if assessment meets criteria Identify level of resource Finalise and agree V10 Approve/recommend Draft EHC Plan Indicate if a plan meeting maybe required If the case needs returning to a future panel If decision is not to proceed with EHCP list reasons why not 	EHC Panel
<ul style="list-style-type: none"> Record decision using panel decision sheets 	SEND Admin

FOLLOW UP TO EHC PANEL MEETING	
If decision "No" to EHC Plan	

What do we do?	Who does it?
<ul style="list-style-type: none"> Record on ONE System Send letter to parents and post 16 setting stating reasons for decision <p>Send summary document to the family with evidence from professionals collected during assessment (Code Of Practice 9.17)</p>	Assistant Plan Coordinator

FOLLOW UP TO EHC PANEL MEETING	
If decision "Yes" To EHC Plan	

What do we do?	Who does it?
<ul style="list-style-type: none"> Record on ONE System 	Assistant Plan Coordinator
<ul style="list-style-type: none"> Update Summary to Draft EHC Plan reflecting resources and recommendations from Panel 	Plan Co-ordinator

SHARE DRAFT EHC PLAN	
<ul style="list-style-type: none"> • What do we do? • Send letter to parents explaining the decision including copy of draft Plan - Decision letter with Draft EHC Plan, Appendices (reports & info gathered) • Offer option of EHC Plan Meeting (within letter / reply slip) • Update One version 4 with decision. • Send copies of the Draft Plan to post 16 setting cc professionals enabling them to respond to the draft (within 15 days) 	Who does it? Assistant Plan Coordinator
If there is no EHC Plan Meeting, go to “Finalising the EHC Plan”	

If EHC Plan Meeting required	
What do we do? <ul style="list-style-type: none"> • Invite professionals to Meeting outlining the reason for the meeting • Confirm meeting date, time and venue to parents 	Who does it? Assistant Plan Coordinator
<ul style="list-style-type: none"> • Chair meeting, update plan with any agreed changes 	Plan Co-ordinator

FOLLOW-UP TO EHC PLAN MEETING	
What do we do? <ul style="list-style-type: none"> • Make amendments to Draft Plan agreed at the plan meeting. • Anything not resolved / agreed at the plan meeting, Plan Coordinator to discuss at Management Meeting in the first instance. 	Who does it? Plan Coordinator
If there are no significant changes go to “Finalising the EHC Plan”	

FINALISING THE EHC PLAN	
What do we do? <ul style="list-style-type: none"> • Issue Final EHC Plan naming institution to family • Send letter to post 16 setting and cc to other contributors to inform them of plan completion enclosing a copy • Allocate resources • Record on ONE • Agree review date with setting 	Who does it? Plan Coordinator
If there are no significant changes go to “Finalising the EHC Plan”	

REVIEW	
Reminder about review sent annually	SENDS Admin
For Annual Review processes see Annual Review Guidance	