

How Surrey operates the EHC assessment and planning process:

From initial request for needs assessment to issue of EHC plan

1. SEND Support Review Meeting

This meeting should normally be held with the family before a request for an EHC needs assessment is made. Its purpose is to review existing support arrangements and progress, as well as discuss whether it is time to consider an EHC needs assessment e.g. if the child or young person requires a more intensive level of specialist help than the resources available can provide. Practitioners are involved as appropriate.

2. Request for EHC needs assessment made (start of statutory process)

The timescales set out in the Code of Practice start when a request for a needs assessment is received. The request will be checked and acknowledged by the SEND caseworker. They may request additional information if needed. Information will be provided to families on the EHC plan process and the expressed views of the parents, child or young person taken into account.

3. Decision whether to assess for EHC Plan

A weekly area meeting is held to consider requests and to decide whether an assessment is needed. The SEND caseworker will advise the parent, carer or young person of the decision by telephone, followed by a letter within two days of the decision meeting. If there are any questions preventing a decision being made then a review meeting will be offered.

If decision
not to assess

The SEND caseworker will inform the family or young person in writing. There will be the opportunity to have a 'Way Forward' meeting. The SEND caseworker will provide details of the right of mediation and appeal. The child or young person should continue to be supported through SEN Support.

4. Gather Advice

The SEND caseworker will request advice from relevant agencies. Mandatory requests are made of Health, Social Care and Educational Psychology. Other agencies will be asked for advice if needed. Effective outcomes for the child / young person will be identified. Agencies are required to provide the requested advice within six weeks. The SEND caseworker will collate the advice and submit the case to the area Partnership Resource Forum (PRF) for a decision.

5. Decision to issue EHC Plan

The Partnership Resource Forum (PRF) meets every two weeks. The PRF will review the advice received and decide whether to issue an EHC plan. The PRF will also consider the type of education provision required and the indicative level of funding required to meet the child or young person's assessed needs. The SEND caseworker will advise the parent/carer/young person of the decision by telephone within two days, followed by a letter enclosing the PRF minutes.

If decision
not to issue

6. EHC Plan prepared

Draft EHC plan is prepared. The SEND caseworker sends this to the family to review. Family asked to name their preferred nursery, school or college. The parent, carer or young person has 15 days to comment on the draft plan and respond with their choice of educational setting. The draft EHC plan is sent to all contributors. A meeting to discuss the draft plan will be offered if required. Personal Budget considered.

7. Request for Nursery / School / College

The educational establishment has 15 days to respond to the local authority to confirm the placement. If a place is not confirmed then there will be a further discussion with the educational establishment. If necessary, an alternative educational setting will be identified.

8. Issue final EHC Plan

The final EHC plan is issued with the name of the chosen nursery, school or college. The plan will record the views, interests and aspirations of the parents and child/young person and establish good, relevant outcomes. It will also include any required health support and/or social care provision. If requested, a Personal Budget will be put in place. If the family or young person is unhappy with the plan they can go through the mediation and appeals process.

6
weeks

16
weeks

20
weeks