Guidance for completing the Education, Health and Care Needs Assessment request form

A family-friendly guide for families, young people, education settings, Early Years services and providers, and other professionals. Aligned with the October 2026 request form.

About this guide
This guide explains how to complete the Education, Health and Care Needs Assessment request form. It is written for families, young people, education settings and professionals. You do not need to have perfect wording or every piece of evidence before making a request. The most helpful requests are clear, honest and specific about the child or young person's strengths, needs, current support and what is still not working. All completed responses in this guide are illustrative examples, not real case records; different sections use different fictional children. What will be considered: The local authority must consider whether the child or young person has or may have special educational needs, and whether it may be necessary for special educational provision to be made through an Education, Health and Care Plan. You do not need to prove that an EHCP is required before requesting an assessment.

Before you start

- Complete as much of the form as you can. If something is not known or not available, say this clearly.
- Use plain language. You do not need to use professional wording.
- Give examples from everyday life, school or college, home and the community.
- Include what has already been tried, how often it happened, how long it continued for, and what difference it made.
- Attach evidence where you have it, but do not delay the request if some evidence is still being gathered.

What makes a strong request?

Good practice	Try to avoid
Describe what is happening, how often it happens, what support is already in place and what impact this has on learning, wellbeing or daily life.	Only listing diagnoses or broad concerns without explaining the impact on the child or young person.
Use specific examples, such as "needs adult support to understand multi-step instructions in most lessons".	Using general phrases such as "struggles in class" without explaining what this looks like.

Explain what has helped, what has not helped enough, and what still needs to change.	Only saying that more support is needed, without showing what has already been tried.

Section-by-section guidance

1. Child or young person's details

Complete the child or young person's name, preferred name, date of birth, year group or age, ethnicity, gender at birth, preferred gender, pronouns, first language and communication needs. Include the setting and its contact, the child's address and contact details where appropriate, both parents' or carers' details and parental responsibility, and the allocated social worker and looked-after or previously looked-after information. Use "not applicable" or "not known" where needed. The table gives selected examples rather than every field. **Evidence tip:** Early Years: name the key person or SENCO and briefly describe how the child communicates and the help they need.

Child or young person's details	Example response
Name	Ravi Patel
Preferred name	Ravi
Education setting	Oakfield Primary School
Any communication needs?	Ravi uses short spoken sentences, visuals and gesture. He understands best when adults give one instruction at a time and allow extra processing time.
Parent/carer 1 name and contact	Mrs A Patel, mother with parental responsibility. Please contact by email where possible. Plain language is helpful when explaining technical information.

2. Who is making this request?

Select all the relevant requester options if the form is completed collaboratively. Give each contributor's name, relationship, organisation or setting where relevant, email and telephone number. State the preferred contact method and any communication or access help needed. **Evidence tip:** Early Years: identify contributors and the coordinating contact; keep family and provider views separate.

Form field	Example response
Request made by	☒ Parent/carer ☐ Young person ☒ Education setting ☐ Other professional
Name	Mrs A Patel and Jo Green
Relationship to child or young person	Parent and school SENCO
Organisation / education setting	Oakfield Primary School
Preferred way to be contacted	☒ Email ☐ Telephone ☐ Letter ☐ Other

Communication or access help needed	Please use plain language and email documents in advance where possible.

3. My voice and my family's views

Share the child or young person's and family's views in writing or another suitable format; separate views can be attached. Record how views were gathered and who supported them. Cover what the child enjoys or values, what feels difficult and what helps, the family's views on what is going well and what needs to change, and the outcome or change most wanted. **Evidence tip:** Early Years: use dated play or routine observations, naming the observer and distinguishing the child's choices from adult interpretations.

Section 3 form prompt	Example response
How were views gathered?	☒ Conversation ☒ Drawing/photo ☒ Supported
Who supported them?	Illustrative example: Maya's key adult helped her share her views, with her parent contributing their own views separately.
What do you enjoy, value or want people to know about you?	Maya says she likes art, animals and sitting with a trusted adult at lunchtime.
What feels difficult, and what would help?	Maya says the playground is too noisy and she feels worried when plans change. A quiet space, advance warning and support from a familiar adult help.
Parent/carer views: what is going well, what is worrying, and what needs to change?	Maya's family are pleased that she has begun to trust key adults. They remain worried about her attendance and distress before school.
What outcome or change would you and your family most like to see?	For Maya to feel safe enough to attend regularly and take part in learning.

4. Summary of the request and reasons for requesting an assessment now

Give a brief summary of the main concerns, why an EHC needs assessment is being requested now, and what it should help clarify. Then complete the separate parent/carer and education setting boxes. These views may differ: record each separately rather than combining them into one agreed account. If a view is unavailable, say so briefly. Include each contributor's name and relationship, or name, role and setting. **Evidence tip:** Early Years: summarise barriers to play, routines and independence, unmet needs and any forthcoming transition.

Section 4 form prompt	Example response
Summary of the request: what are the main concerns, why is an assessment being requested now, and what would you like it to help clarify?	Illustrative summary: Aisha's needs affect her attendance, emotional wellbeing and access to learning. Assessment is requested to clarify her needs and the coordinated provision she may require.
Parent/carer view: why do you feel an assessment is needed now? What needs	Illustrative parent/carer view — Mrs A Patel, mother: Aisha is distressed before school and

remain unmet, and what support or change do you hope for? Please include the name and relationship of the person sharing this view.	needs frequent help to manage the day. We would like the assessment to explain what support would help her feel safe and attend more consistently.
Education setting view: why does the setting consider an assessment is needed now? What has support already tried shown, what needs remain unmet, and what should an assessment help clarify? Please include the contributor's name, role and setting.	Illustrative education setting view — Jo Green, SENCO, Oakfield Primary School: Across two terms, reduced language, visual prompts, daily check-ins and small-group intervention have helped in some areas, but Aisha still needs frequent adult support and is not accessing learning consistently. Assessment should clarify her needs and the provision required.

5. What are the child or young person's needs and how do these affect them?

For each relevant area, describe strengths, needs and their impact. The first four areas have separate strengths boxes: Communication and interaction; Cognition and learning; Social, emotional and mental health; and Sensory and/or physical needs. Also complete Health needs linked to learning or development and Social care needs linked to SEN or disability where relevant. Explain the effect on learning, development, wellbeing, independence or daily life, rather than only listing diagnoses.

Evidence tip: Cite the report title, author, date and page or section, or record what was observed, where, when and by whom. For Early Years, show strengths, independent skills and help needed in play and routines, noting differences between home and setting.

Communication and interaction — completed example	
Child or young person's strengths	Illustrative example: Sam enjoys practical tasks and shares his ideas with a familiar adult. Visual demonstrations help him understand what to do.
Needs and impact	Sam finds it difficult to understand long verbal instructions and work out what information is most important. He may not start tasks without adult support and can become anxious when he is unsure what to do. This affects his independence and access to learning in most lessons.
Evidence	Illustrative evidence: Class teacher observations during lessons and SEN Support reviews from autumn 2025 and spring 2026 describe Sam needing instructions repeated, reduced and supported visually. Specialist teacher advice dated 18 January 2026 also describes this need. Add the report title, author and page or section when available.

6. Current learning levels

Record the most recent learning or assessment information available. Cover Reading, Writing, Maths, Communication / language and Other relevant area as appropriate. Give the current level or attainment, the child's age at assessment / testing, whether the information shows they are significantly behind peers/age related expectations, and the evidence and assessment date. Explain what any scores mean in everyday learning. **Evidence tip:** Early Years: attach the dated

EYDJ Grid, naming the assessor. Use age-appropriate observations of strengths, emerging skills and support needed; explain missing evidence without delaying the request.

Area of learning	Current level / attainment	Age at assessment / testing	Significantly behind peers/age related expectations?	Evidence / assessment date
Reading	Reading age 7 years 4 months; needs adult help to access classroom texts	10 years 2 months	Yes	Standardised reading assessment, March 2026

7. Support currently in place, support previously tried and level of success

Include current and previous support through ordinarily available provision, SEN support, reasonable adjustments, intervention plans, pastoral support, health advice or social care support. For each entry, describe what was provided, who provided it, how often and for how long, start and end dates where known, its impact and what still needs to change. Distinguish support actually delivered from support only recommended or requested. **Evidence tip:** Early Years: include everyday adaptations, attendance, actual support frequency and dates, and observed progress or continuing difficulties.

Support / intervention	Current or previous?	Who provided it, and how often?	Duration / dates	Success, impact and what still needs to change
Targeted literacy intervention	Previous	Teaching assistant, 20 minutes, four times each week	September–December 2025	Jamie engaged well and learned some new sounds. Assessment showed limited progress and he still needs adult support to read classroom texts.

8. SEN Support plan and graduated response review cycle

Summarise the current SEN Support plan and assess, plan, do, review cycle, and attach the plan if available. State whether there is a current plan and its targets or intended outcomes. Explain how often it is reviewed, who is involved, what the review showed and what changed as a result. If a plan is not available, say so and describe the support and reviews that have taken place. **Evidence tip:** Early Years: show the starting point, agreed next step, support delivered, actual review dates and changes agreed with the family.

Section 8 form prompt	Example response
Is there a current plan, and what are its targets or intended outcomes?	Yes. Theo's current SEN Support plan aims for him to begin familiar tasks using visual instructions and to complete a short piece of independent written work in three lessons each week.
How often is it reviewed, who is involved, and what has changed following review?	The plan is reviewed each term with Theo, his parent, class teacher and SENCO. The autumn review showed that visual instructions helped him start tasks, but he still needed adult support in most lessons. A workstation, reduced language and a daily check-in were

	added. Distress at the start of lessons reduced, but close prompting is still needed for written work.

9. Outreach, alternative provision and 1:1 professional support

Include outreach, alternative provision or one-to-one professional support that is current or was previously involved. Give the service or professional, their role, whether involvement is current or previous, what was provided, frequency and impact. Explain how advice was put into practice and what difference it made. If advice is awaited, make that clear rather than describing it as delivered support. **Evidence tip:** Early Years: list services involved, distinguish direct work from advice, and note how recommendations were used and their impact.

Outreach, AP or professional	Type of support / role	Current or previous?	What is/was provided, frequency and impact?
Specialist teacher	Assessment, observation and advice to school	Previous	Visited in January 2026 and recommended visual supports, pre-teaching vocabulary and reduced written recording. These strategies are used in class, but progress remains slow and a high level of adult support is still needed.

10. Evidence checklist

Mark each evidence type using the options shown on the form and add its date and author. Do not delay making a request if some evidence is not available. Briefly explain what is missing or awaited. “Not available” and “not applicable” are different: use the option offered for that evidence type and add an explanation where needed. The table below shows selected examples. **Evidence tip:** Early Years: include the EYDJ Grid and relevant dated observations, plans, reviews and advice already held; explain anything awaited.

The revised checklist covers:

- Child or young person views
- Parent/carer views
- SEN support plan / graduated approach records
- Provision map or intervention records
- Assessment information or progress data
- Attendance, behaviour or exclusion information
- Health advice or reports
- Social care advice or reports
- Educational Psychology advice
- Early Years Developmental Journal (EYDJ) Grid
- Other professional advice

Evidence type	Attached?	Date / author
Child or young person views	☒ Yes	Drawing and notes from trusted adult, 6 May 2026

Parent/carer views	☒ Yes	Mrs A Patel, 8 May 2026
Educational Psychology advice	☒ Yes	Dr J Smith, 12 May 2026
Health advice or reports	☐ No	Speech and language therapy advice requested; not yet received

11. Consent, information sharing and preferred contact

Read the information-sharing explanation before recording a decision. The revised form describes sharing relevant information to consider the request, decide whether assessment is needed, gather advice if agreed and arrange or review support if an EHCP is issued. It identifies services that may receive information, explains that sharing may continue while an EHCP is in place, and says information will be shared only with people who need it for their role.

The form states that a request will still be considered if consent is not given, although it may be harder to gather advice or arrange support. It also explains that information may still be shared where there is a legal duty, safeguarding concern or another lawful reason. Select the option that reflects the person's decision: do not pre-tick agreement. Ask to discuss any uncertainty before signing.

Completing the fields: For parent/carer consent, enter the name, signature and date. For child or young person consent, where appropriate, enter the name, signature or preferred confirmation and date. Record preferred contact arrangements and communication or access help in Section 2; Section 11 no longer has a separate preferred-contact row. **Evidence tip:** Early Years: use accessible explanations, record questions and complete the child's consent field only where appropriate; do not assume agreement.

Form field	Example completion
Parent/carer consent	☒ Yes ☐ No ☐ I would like to discuss this first Name: Mrs A Patel Signature: A Patel Date: 14 May 2026
Child or young person consent, where appropriate	☒ Yes ☐ No ☐ I would like someone to explain this to me Name: Aisha Patel Preferred confirmation: discussed and verbally agreed with parent present Date: 14 May 2026

12. Final check before submitting

Use the form's final check to mark "Yes" or "Info unavailable" and add notes where needed. Missing information should be explained, not hidden. Check the following before completing the separate Sign-off table. **Evidence tip:** Early Years: check the EYDJ Grid or explanation of its absence, separate family/provider views, routine-based support, review findings and any forthcoming transition.

- The request explains the child or young person's needs and impact clearly.
- Child or young person views have been included or the reason they are not included is explained.
- Parent/carer views have been included or the reason they are not included is explained.

- Support already tried has been described, including frequency, duration and impact where known.
- Evidence has been attached where available, or missing evidence has been explained.
- The request explains why an EHC needs assessment is being requested now.
- The graduated response, unmet need and support beyond ordinarily available provision have been explained.
- Contact details and communication needs are clear.

Sign-off

Complete the form's Sign-off table with each signatory's Name, Role / relationship, Signature and Date. Keep this separate from the consent decisions in Section 11.

Helpful sentence starters

- "What we most want people to understand about the child or young person is…"
- "This affects learning because…"
- "This affects daily life because…"
- "The support that has helped most is…"
- "The support has not been enough because…"
- "We are asking for an EHC needs assessment now because…"
- "The outcome we would most like to see is…"

Plain English glossary

Word or phrase	What it means
EHC needs assessment	A detailed assessment to decide whether a child or young person needs an Education, Health and Care Plan.
EHCP	An Education, Health and Care Plan. This is a legal document that sets out needs, outcomes and the special educational provision required.
SEN Support	Support provided by an education setting for a child or young person with special educational needs.
Graduated response	The assess, plan, do, review cycle used to understand needs, put support in place and review whether it is working.
Ordinarily available provision	Support that schools and settings are generally expected to make available for children and young people with SEND.
EYDJ Grid	The Early Years Development Journal grid requested in Section 6 and listed as the Early Years Developmental Journal (EYDJ) Grid in Section 10. Include it where available to support the description of the child's development.

Reference points for this guide

Section order, form prompts, the EYDJ Grid request and information-sharing guidance have been aligned with the supplied New EHCNA Request Final Oct 2026 form. Early Years tips are suggested ways of presenting relevant information, informed by the Department for Education's

SEND assessment guidance and resources and Support for practitioners resources (consulted 4 November 2026).