

School User Guide – Completing an Annual Review

Schools should always refer to the Annual Review Notes of Guidance provided by EA Statutory Assessment and Review Service (SARS) for more detailed information on the Annual Review process and Transition Planning.

For all Annual Reviews, follow the Standard Annual Review process. For additional forms see the *Annual Review types* in the table of contents below and complete.

You can *change the type of Annual Review* by following the steps and guidance on [page 13](#).

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Annual Reviews Dashboard

and summary table



Annual Reviews

National Curriculum Year

SEN AR 2024/25

Please Select a School

Summary:

28

Open

0

Meeting Scheduled

0

Meeting Heard

0

School Complete

If you have more than one school setting, select from dropdown list

Search Pupil Name

Meeting Statuses

- All Statuses -

- All Template Types -

Annual Review Types

dd/mm/yyyy

Created Date (From)

dd/mm/yyyy

Created Date (To)

Search Student Id

Include Cancelled?

Toggle to show cancelled Annual Reviews

Reset all Filters

You selected 0 applications on this page

Educational Psychology

Export to .xlsx (0)

+ Create New AR

Adds a missing child to the summary table (page 4)

<input type="checkbox"/>	Student ID	Pupil Name	School	NCY	Created	School Deadline	Status	Meeting Date
--------------------------	------------	------------	--------	-----	---------	-----------------	--------	--------------

Checkbox

Sort Columns


1. Use any of the dropdown lists to filter the summary table
2. Use the **arrows** at each column header to sort the date in alphabetical or numerical order
3. Click any checkbox to the left of the **Student ID**, this will make the **Export to** button active. Click on the **Export to** button to download the selected data
4. The **Educational Psychology** button allows you to **Set Involvement** for each pupil, this will update the **Annual Review Form**. (page 9)

Access EA Connect

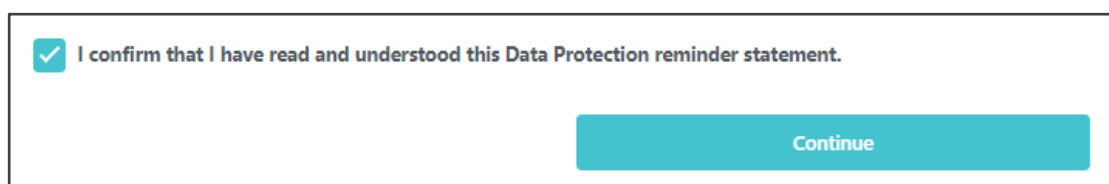
1. Using **Google** or **Microsoft edge** enter this URL: <https://connect.eani.org.uk/school/>

OR

In  click **View All, Education Authority** and **EA Connect**.

2. Enter your **user email address** and **password**, click .

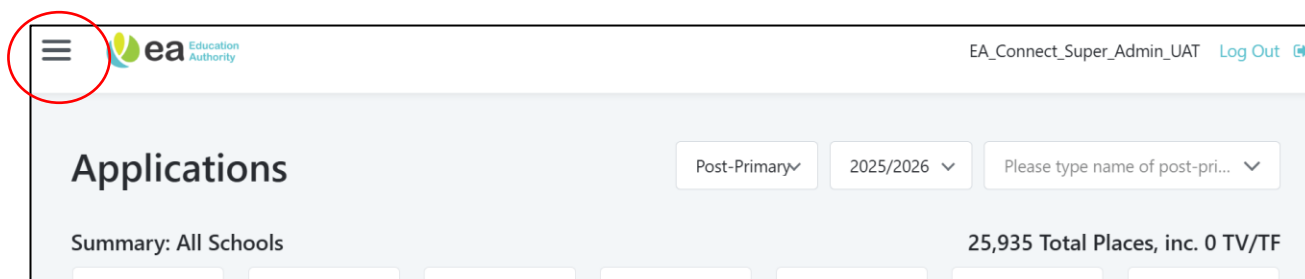
3. Read the **Data Protection Statement**, tick the confirmation box and select **Continue**.



4. From the menu bar, select  this will take you to the **Annual Reviews** screen.

EA Connect Menu

To access the menu options for your Service on EA Connect, **select** the three lines at the top left corner of your landing page (note the heading of the landing page will differ according to which user/service you are logging in as).



A menu will display on the left side of your screen with your **username** and options available according to your role and access. Use the **expanding** drop-down arrows (if applicable) to expand sub-menus and select option required.

Review Pupil Data

Before scheduling any Annual Review, we ask all school users to sense check their pupil data. If there are any discrepancies on EA Connect compared with the information held in schools. Please contact your SEN Link Officer and request that the child's details are updated on Capita to then be reflected on EA Connect following the overnight update. This can include,

- Pupils who have left

- Pupils who do not attend your school.
- Pupils who are missing from the list.
- Pupils in an incorrect year group.
- Deceased pupils.



SARS will update the pupil record on Capita. Once completed, EA Connect will automatically update the following day allowing you to action your annual review.

To Open a pupil’s Annual Review, select the blue Student ID number:

Student ID ↕
2000101


Create a New Annual Review

If you cannot find a pupil on the **Annual Reviews** summary table, you may need to create a New Annual Review.

1. On the **Annual Reviews** screen, click .
2. The **New Annual Review** pop up will appear, your school will be pre-populated.
3. Click the dropdown arrow  at and select a pupil.

Note: If the pupil is not listed on the dropdown, please contact your SEN Link Officer and request that ‘the child’s detail are updated on Capita’. Once completed, EA Connect will automatically update the following day. This will allow you to create the **New Annual Review**.

4. If an **Annual Review** already exist for the pupil the following error message will appear, check your AR list to ensure no review is there.

 An Annual Review already exists for this pupil. Are you sure you wish to create another Annual Review? You can change the date and/or time of the meeting by selecting the pupil’s name on the calendar, rather than creating a new AR.

If you receive this message but there is no AR on your school list, please contact your SEN LO to have the AR placed in your school.

Note: You can schedule an **Annual Review** using the **Calendar**, once scheduled you can change the type of Annual Review ([page 13](#)).

5. The **Date of Birth**, **Gender** and **Address** fields are greyed out, this data is pulled from Capita.

6. Click the dropdown arrow  at  and select the **Type of Annual Review**.

7. Click .

8. You can complete as much information on the AR as you wish **prior** to the Annual Review meeting taking place.

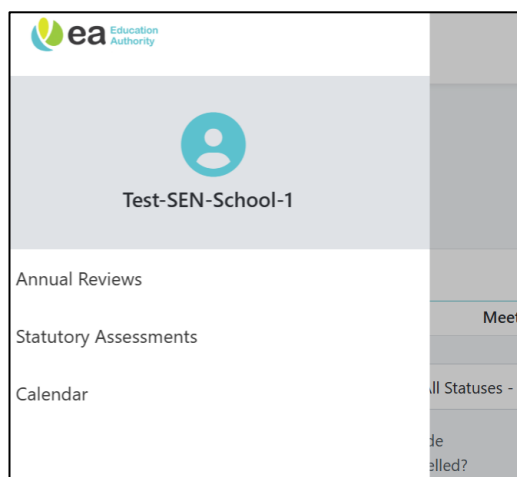
Note: You will now see the Annual Review on the **Annual Reviews** summary table. You must schedule the Annual Review meeting using the **Calendar**. See below **Schedule an Annual Review**.


Schedule an Annual Review

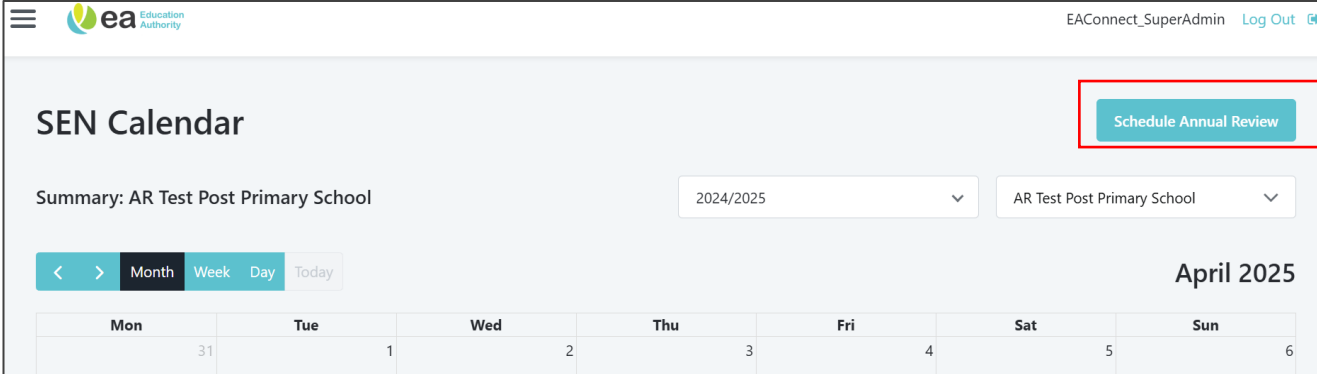
Note: You must schedule an Annual Review meeting using the **calendar tab**. **If you do not schedule the meeting, you cannot mark the Annual Review as School Complete.**

Parent’s cannot access their Parental Contribution form until the AR is Scheduled and they have been invited.

1. From the menu bar, click **Calendar**:



2. Click .



Summary: AR Test Post Primary School

2024/2025

AR Test Post Primary School

Month Week Day Today

April 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	1	2	3	4	5	6

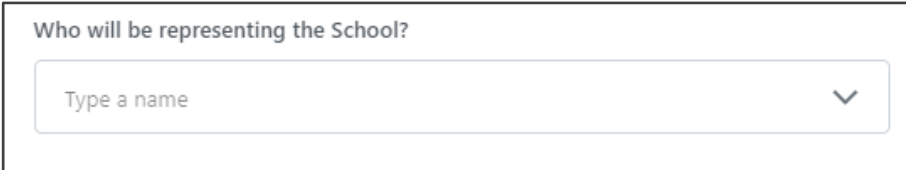
- Click the dropdown arrow at **Search and Select Annual Review** and select a Pupil.



- Click the **calendar icon**, at **Date and Time** and select the required date and time.



- Click the dropdown arrow at **Who will be representing the School?** and select the school representative.





- Click [+ Add School Additional Representative](#) to add additional Representatives.


NOTE: For NCY -1 & -2, the SENLO will appear in the School Representative drop down list. This is because the EA recognises that SENLOs can create and perform ARs for NU children.

- Click the dropdown arrow  at **Attendee 1** and enter **First name**, **Surname** and **Email**.




Attendee 1 ⚠
⤴

8. To delete an **Attendee**, click the same dropdown arrow  at the relevant **Attendee** and click .

NOTE: If you add a parent/Attendee/other representative with an incorrect email address, **DELETE** the attendee and add them again using the correct details. **The system will then automatically send a new invite to the correct email address.**

9. Click  to add a **Parent**.
IMPORTANT – Extreme care must be taken when inputting parental email addresses. Incorrect email addresses may result in a DATA BREACH.

Note: Please ensure Parent email addresses are correct as if not they will not receive an invite to the meeting, and they cannot submit parental contributions digitally via EA Connect. If you do not have an email address for them, **or have already held the Annual Review meeting**, do not add them here (do not add any parent rep) as the system will not allow you to continue without these fields being complete.

10. Click the dropdown arrow  at **Attendee 1** and enter **First name**, **Surname** and **Email**.
11. To delete an **Attendee**, click the same dropdown arrow  at the relevant **Attendee** and click .
12. Click the dropdown arrow at **EA Authority Representatives** and select the EA representative.

EA Authority representatives

Type a name
▼

+ Create EA representative

13. If the EA Representative is not listed, click **+ Create EA representative** enter the **First Name, Last Name, Email** and **Contact Number** and click **Save**.

14. Click the dropdown arrow at **HSCT/ Other Representatives** and add in the same way.

HSCT/Other representatives

Type a name
▼

+ Create HSCT/Other representative

15. If the **HSCT/ Other Representatives** are not listed, click **+ Create HSCT/Other representative**. Enter the **First Name, Last Name, Email** and **Contact Number** and click **Save**.

16. **Please add here any details related to the meeting**, enter relevant details in the box if applicable.

Note: If you need to change the meeting date/ time, edit the existing meeting. Once updated, this will send an automated email to all attendees with the new meeting details. Do not create a duplicate meeting.

Attendees invited to the review meeting from the Calendar tab will auto-populate onto the Annual Review Form and vice versa.

Team Meeting Link

17. If the meeting is held on **MS Teams/Zoom**, create a **Teams/Zoom Meeting** in your **Outlook Calendar**.

18. Right click on the **Meeting Link**.

Microsoft Teams meeting

Join on your computer, mobile app or room device

[Click here to join the meeting](#)

Meeting ID: 342 650 8

Copy Link
Open Link


19. Select **Copy Link**.

20. Right click and paste in the box **Please add here Teams meeting details**.

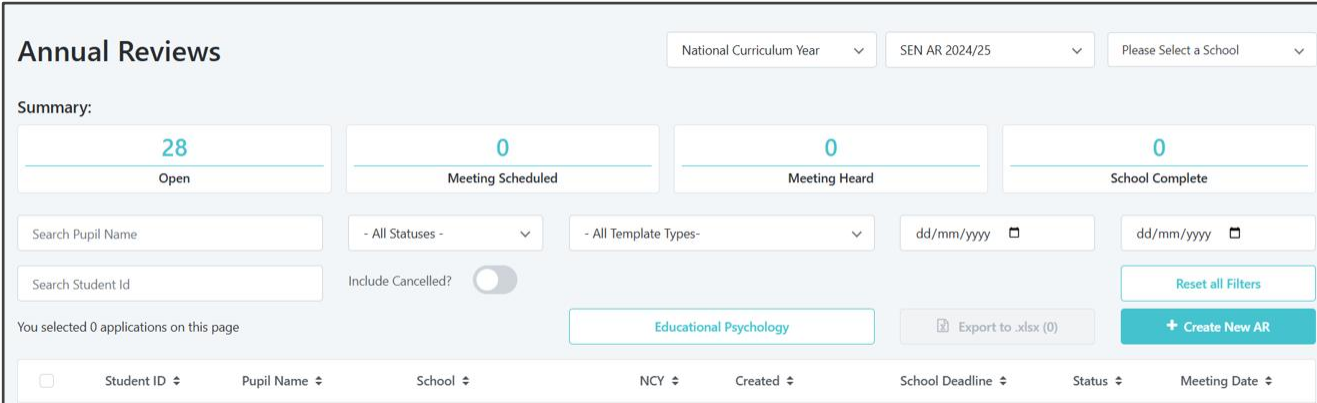
21. Click .

Note: Please ensure all email addresses entered are correct, where you have added email addresses, all attendees will receive an email with meeting details. If you have not entered email addresses, you must follow up with all attendees separately.

Complete a Standard Annual Review

- From the menu bar, click .
- From the **Annual Reviews** screen.
- Click blue **Student ID** number.

Note: The order of any column may be changed in alphabetical or numerical order by clicking the double arrows beside each column heading.



Annual Reviews

National Curriculum Year | SEN AR 2024/25 | Please Select a School

Summary:

- 28 Open
- 0 Meeting Scheduled
- 0 Meeting Heard
- 0 School Complete

Search Pupil Name | - All Statuses - | - All Template Types- | dd/mm/yyyy | dd/mm/yyyy

Search Student Id | Include Cancelled?

You selected 0 applications on this page

Educational Psychology | Export to .xlsx (0) | + Create New AR

Student ID | Pupil Name | School | NCY | Created | School Deadline | Status | Meeting Date

Educational Psychology to attend an Annual Review

For all pupils, you must select if EP involvement is required.

There are two ways Schools can request Educational Psychology Involvement.

- Within the pupil Annual Review form (see below) from the Annual Reviews summary screen ([page 28](#)).
- Using the Educational Psychology button on the Annual Review page.

Educational Psychology

Once selected, this sends an automated email to the EP who will add the child to their case load.

4. Select if you require Educational Psychology involvement in the Annual Review.

Educational Psychology ^

Please select one of the two options below:

Educational Psychology involvement requested for this Annual Review

Educational Psychology involvement NOT requested for this Annual Review

Rectangular Snip
Save Changes

5. If you selected Involvement required, please select one of the following three options.

Please select one of the options below:

School/parent/carer identifies a new SEN with supporting evidence;

School or SARS request it because there is a significant change in the pupil's SEN or there is clear evidence that the current placement type is no longer meeting the child's SEN (i.e. child needs to move from mainstream to special or vice versa);

An Educational Psychologist (EP) has indicated there is a requirement for involvement.

Rectangular Snip
Save Changes

Save Changes

6. Click Save Changes.

Note: If you need to change the selection you have made, you can reselect the EP involvement and update the options accordingly however this will create a second row for EP therefore care should be taken when initially selecting options.

7. Using the Educational Psychology button opens the Educational Psychology Pupils page.

8. Using the Set Involvement button, select the required option as per the details in step 4 & 5, then confirm.

Document Upload

Documents relevant to the Annual Review may be uploaded. Repeat this process for the parent and school, if applicable.

Note: Were you added a Parent's email address when creating the Annual Review, the Parent will login to EA Connect and complete the Parental Contribution and Young Persons Contribution Forms. Once submitted contributions will automatically populate into the Annual Review Form for you.

Note: Before a meeting takes places, the parent can view any documents uploaded by a school to the AR. A Parent cannot edit or delete these school documents.

If a Parent has not completed Parental Contributions online, you can upload these on their behalf in a digital format e.g. MS Word or take an image of handwritten contributions and upload using the steps below.




9. Click  in the relevant section(s).

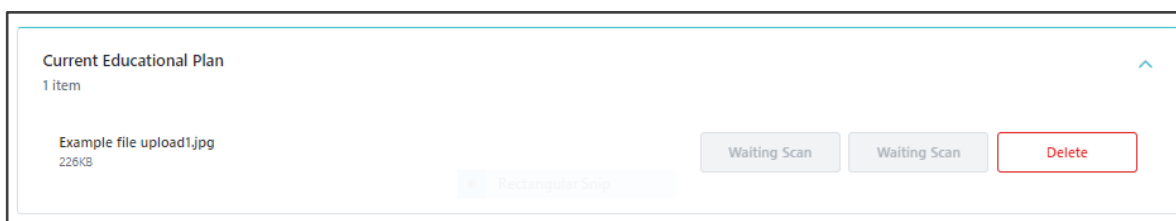
10. Click the dropdown arrow at **Document Type** and select from the list provided.



11. Under **Document File**, click the **Cloud Icon**  locate and select the relevant document.

12. Click .

Note: Once uploaded, the file can be removed by clicking the dropdown arrow  and click **Delete**.



13. When documents have been uploaded on behalf of the Parent and/or School, click

.

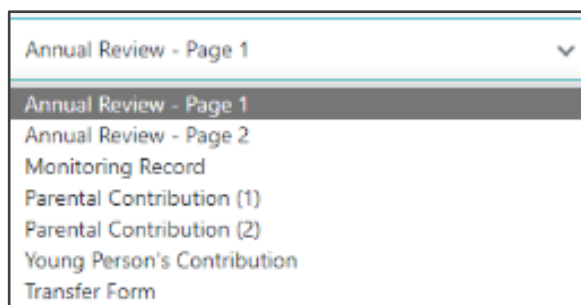
14. Click **Edit Form** to view the specific annual review for the pupil selected.



Annual Review – Page 1

Note: Each Annual review is configured for each pupil. Pupil information displayed is based on the information held by the SARS team on Capita. Information greyed out is pre-populated by the EA.


15. Clicking the dropdown arrow at the top of the screen will allow you to move between the Annual Review Forms. Only use the dropdown after you have entered and saved information into each form.




16. Click on the **calendar icon**  to enter the **Date of Admission**.

17. Complete **Percentage attendance in current year** and **Class Size** fields.

18. Click the dropdown arrow  at **Primary SEN Category** and select **one** category only.

19. Click the dropdown arrow  at **Secondary SEN Category/ies (if appropriate)** and select if applicable. More than one category may be selected.

20. Click the dropdown arrow  at **Medical Category/ies (if appropriate)** and select if applicable.

21. A category selected in error can be removed by clicking .

Confirm Address Details

22. Continue to complete fields **Name of person 1 with parental responsibility**, **Relationship to pupil**, **Parent 1 Contact Number**, **Email Address** and **Address** .

23. If the **Pupil's Address** is not correct click to change.
24. Enter the new **postcode** of the pupil's address.
25. Click and select the address from the list displayed.
26. If the address is not displayed click and enter the new address.
27. If the parent's address is different from the pupil's enter the postcode and click to select the address from the list displayed.
28. If the address is not displayed click and enter the new address.

Note: In some instances the contact number and Parental email may be pre-populated based on data held on Capita. If this information is incorrect it can be updated here.

Second Parental Contribution Form

29. Schools can decide if a **Second Parental Contribution Form** is required (e.g. separated parents, social services involvement) or the second parent can request to complete a form.
30. If a second parent is requested, tick and enter the parental details.

Note: If parents live in the same house, they do not both need complete a second parent section but they may if they wish.

Type of Annual Review Meeting

31. The Annual Review meeting information will appear if the Annual review has been scheduled.

Note: The type of Annual Review meeting is prepopulated based on the current year group of the pupil. If the type of review needs to be amended, this can be changed by the school or SENLO.

An **Annual Review with Transfer Review** or **Annual Review with Transfer Review and Transition Plan** cannot be changed.

Type of annual review meeting	Date of meeting
<input type="text" value="Annual Review with Transfer Review"/>	<input type="text" value="09/09/2024 15:29"/>

Changing the type of Annual Review

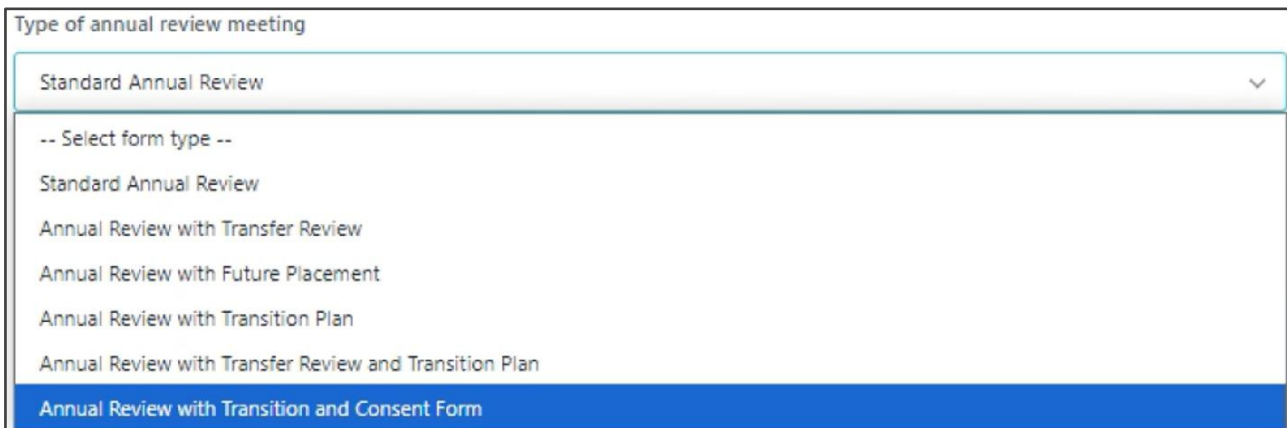
If circumstances have changed the type of Annual Review can be changed without the need to cancel an Annual Review meeting.

Note: This can only be changed when the status of an Annual Review is **Open**, **Meeting Scheduled** and **Meeting Heard**.

Types of Annual Review you can change:

- Standard Annual Review.
- Annual Review with Future Placemen.
- Annual Review with Transition Plan.
- Annual Review with Transition and Consent Form.

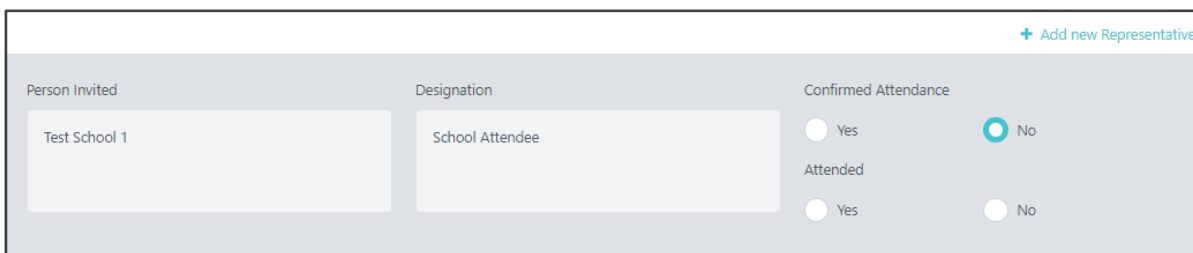
If you change an Annual Review to an **Annual Review with Transfer Review** or **Annual Review with Transfer Review and Transition Plan** this cannot be changed once saved.



32. Click the dropdown arrow at **Type of Annual Review Meeting** and select from the list.

Representatives Details

33. When you scheduled the Annual Review using the Calendar, the persons invited will be listed in the Annual Review for as shown below. You can click to confirm if the invitee confirmed and/ or attended the meeting.



Person Invited	Designation	Confirmed Attendance	Attended
Test School 1	School Attendee	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

34. If you didn't add representatives when creating the meeting invite in the Calendar tab, click:



35. Save.

Action (by School)

36. Select **Action (by School)** by clicking in the appropriate box. Only one option can be selected.

Action (by School)*

No change to Placement or Provision
 Change of Placement
 Amendment to Statement including change to provision
 Cease Statement

Note: This is a mandatory field, you must select an **Action** to move to the next form.

Current Provision

37. If applicable, click the tick box on type of **Current Provision**, the text box will turn white. Enter text for the provision. (maximum 250 characters). Repeat for all relevant **Provisions**.

Current Provision

Please tick the box and give details of each provision (eg, time)

Specialist Equipment (specify)

Please fill in with a max. of 250 characters

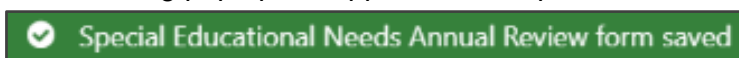
NOTE: These fields will populate future AR with the information entered here. The data can then be edited as required in each subsequent year.

38. Click the dropdown arrow at Access Arrangements more than one option can be selected.

39. Repeat for **Access to Pupil Support Services** and **Access to Therapy**, if applicable. More than one option can be selected.


40. Click  when all fields have been completed.

41. The following pop up will appear at the top of the screen.



42. Click Next.

43. To return to the previous page, click Previous.

Note: For all free text boxes where you see a double line  at the bottom right-hand corner, you can extend the size of the text box to read the information entered.

Annual Review – Page 2

44. Select the radio button **Yes** or **No** for each question. The selected radio button will turn blue.

Yes No

45. If answering **No** to questions **1, 2, 4** or **6** details must be provided in the box below (maximum 1500 characters).

46. If answering **Yes** at question **3** ensure that documentation is attached on **the Pupil Details** page.

47. If answering question **7**, **Amended** or **Ceased** details must be provided in the box below (maximum 1500 characters)

48. **Are all those attending Review in agreement** details must be provided in the box below (maximum 1500 characters) and **Action Required?**

49. Click  when all fields have been completed.

50. Click .

Monitoring Records


Enter details of Most recent Standardised Test Results (Relevant for Pupils with SEN in the Areas of SpLD, MLD or Speech and Language).

51. Click  to add **Most recent Standardised Test Results** .

52. To remove a result click  to the right of the standardised score.

53. Complete information for **Framework of Support for Pupil**. (maximum of 1500 characters).

54. **SENCo** and **Principal Signatures** must be typed in and dated before submitting to the EA.

55. Click  when all fields have been completed.

56. Click .

Parental Contribution (1)

Schools will have access to information provided by parents on the school portal providing they have **Submitted** their contribution prior to the meeting.

The form can also be amended/completed during the Annual Review meeting.

Or, you can upload a paper version of parental contribution using the template available from EA Statutory Assessment and Review Service (SARS) AR Notes of Guidance booklet on the **Pupil Details** page.

57. Click  when all fields have been completed.


58. Click .

Note: Once the AR is marked as **Meeting Heard**, then parent will no longer be able to edit their contribution form.

Parental Contribution (2)

Note: Parental Contribution (2) is for Parents who do not live at the pupil's address and wish to contribute to the Annual Review meeting.

If this is the case, repeat steps in **Parental Contribution (1)**.

59. Click  when all fields have been completed.

60. Click .

Young Person's Contribution

Schools will have access to information provided by parents on the school portal.

The form can also be amended/completed during the Annual Meeting.

If more appropriate, you may upload a paper version of the pupil contribution form using the templates that are available from EA Statutory Assessment and Review Service (SARS) AR Notes of Guidance booklet.

61. Pupil Signature and If a young person is supported by an adult, names must be typed and dated in the box provided.

62. Click  when all fields have been completed.

63. Click .

Note: If you are completing a standard Annual Review, please move to **Submitting your Annual Review Form** ([page 25](#)) For all other **Annual Review Type**, please follow the relevant sections below.



Complete a Annual Review with Transfer Review

Transfer/ Change of Placement (TR), this section should be completed if the pupil is transferring schools or will have a Change of Placement.

Future Placement

1. **Pupil Name, Pupil ID No** and **Date of Birth** are pre-populated.

Section A | School Preferences

2. To select schools click .
3. **Select a school to add as a preference** pop up will appear, click the dropdown arrow  at **Select a School**.

Note: Up to three schools can be selected.

4. Scroll down to select a school or type the name or part of the school name into the search.

5. Click .

6. To reorder the **School Preference**, click  to the left of the preference and drag as required.

Section B | Comments

7. Include any additional comments if applicable (maximum of 1500 characters).

Section C

8. Read the statements at Section C and select a tick box.
9. **Parent Signature** and **Date of Signing** must be typed in the box provided.

10. Click .


11. Before clicking **Finish**, read **Submitting your Annual Review Form** ([page 25](#)).


Complete a Annual Review with Future Placement

Early Indication of Future Placement, this section will be completed if the pupil is transferring schools or will have a Change of Placement.

Future Placement

Section A | School Preferences

1. To select schools click .

2. **Select a school to add as a preference** pop up will appear, click the dropdown arrow  at **Select a School**.

Note: Up to three schools can be selected.

3. Scroll down to select a school or type the name or part of the school name into the search.

4. Click .

5. To reorder the **School Preference**, click  to the left of the preference and drag as required.

6. **Parent Signature** and **EA Signature** must be typed and dated in the box provided.

7. Click .



8. Before clicking **Finish**, read **Submitting your Annual Review Form** ([page 25](#)).

Complete a Annual Review with Transition Plan

Complete the below forms if completing an **Annual Review with Transition Plan** or an **Annual Review with a Transition Plan and Consent Form**.





Note: When you complete the Transition plan, this will remain on the form for future Annual Reviews and the information contained will copy across. You will then be able to edit the field if required next year.

Transition (14+) Plan

1. **School Name**, **Pupil ID No** and **Date of Birth** fields are pre-populated.
2. Click the dropdown arrow  at **Primary SEN Category** and select **one** category only.
3. Click the dropdown arrow  at **Secondary SEN Category/ies (if appropriate)** and select if applicable. More than one category may be selected.


Type information under **Transition Needs**, **Action** and **Agencies Responsible** for:

- Academic.
- Career/ Future.
- Health/ Therapy.
- Personal/ Family/ Social.
- General Action.
- Personal/Family/Social.

4. **Note:** Hover over the  beside **Action** for more information.
5. Add the **Principal or SENCo Signature**.
6. At **Proposed Leaving Date**, click  and select the relevant date.
7. Click .
8. Click .

Consent Form

Note: This form only needs to be completed when the pupil is transferring.

1. **Pupil's Name, Address and School Attended and Date of Birth** fields are pre-populated.
2. At **Date of Leaving** click  and select the relevant date.
3. Tick the boxes below which consent is being given for.

I give consent to the following undernoted information being forwarded to the relevant body:

A Statement of Special Education Needs	<input type="radio"/> Yes	<input type="radio"/> No
Most recent Annual Review	<input type="radio"/> Yes	<input type="radio"/> No
Final Transition Plan	<input type="radio"/> Yes	<input type="radio"/> No
Details of any exam concessions	<input type="radio"/> Yes	<input type="radio"/> No

4. Add the **Parent Signature** and **Date of Signing**.

5. Click .

6. Before clicking **Finsih**, read **Submitting your Annual Review Form** ([page 25](#)).

Complete a Annual Review with Transition Plan



Note: Complete these forms if completing an **Annual Review with Transfer Review and Transition Plan**. If completing an **Annual Review with Transition Plan** you will not see or complete the Transfer Form.

Note: When you complete the Transition plan, this will remain on the form for future Annual Reviews and the information contained will copy across. You will then be able to edit the field if required next year.

Transfer Form




1. **Pupil Name, Pupil ID No and Date of Birth** fields are pre-populated.

Section A | School Preferences



2. To select schools click .
3. **Select a school to add as a preference** pop up will appear, click the dropdown arrow  at **Select a School**.

Note: Up to three schools can be selected.

Scroll down to select a school or type the name or part of the school name into the search.

4. Click .
5. To reorder the **School Preference**, click  to the left of the preference and drag as required.
6. **Parent Signature** and **Date of Signing** must be typed and dated in the box provided.
7. Click .
8. Before clicking **Finish**, read **Submitting your Annual Review Form** ([page 25](#)).

Transition (14+) Plan

1. **School Name**, **Pupil ID No** and **Date of Birth** fields are pre-populated.
2. Click the dropdown arrow  at **Primary SEN Category** and select **one** category only.
3. Click the dropdown arrow  at **Secondary SEN Category/ies (if appropriate)** and select if applicable. More than one category may be selected.

Type information under **Transition Needs**, **Action** and **Agencies Responsible** for:

- Academic.
- Career/ Future.
- Health/ Therapy.
- Personal/ Family/ Social.
- General Action.
- Personal/Family/Social.

4. **Note:** Hover over the  beside **Action** for more information.
5. Add the **Principal or SENCo Signature**.

6. At **Proposed Leaving Date**, click  and select the relevant date.

7. Click .

8. Click .

Consent Form

1. **Pupil's Name, Address and School Attended and Date of Birth** fields are pre-populated.

2. At **Date of Leaving** click  and select the relevant date.

3. Tick the boxes below which consent is being given for.

I give consent to the following undernoted information being forwarded to the relevant body:

A Statement of Special Education Needs	<input type="radio"/> Yes	<input type="radio"/> No
Most recent Annual Review	<input type="radio"/> Yes	<input type="radio"/> No
Final Transition Plan	<input type="radio"/> Yes	<input type="radio"/> No
Details of any exam concessions	<input type="radio"/> Yes	<input type="radio"/> No

4. Add the **Parent Signature** and **Date of Signing**.

5. Click .

6. Before clicking **Finish**, read **Submitting your Annual Review Form** ([page 25](#)).

Submit your Annual Review Form

Before submitting your Annual Review form to EA, ensure that:

1. You have completed **Action (by School)** on **Annual Review - Page 1**.

Action (by School)*

No change to Placement or Provision Change of Placement Amendment to Statement including change to provision Cease Statement

2. You have completed **Action Required?** on **Annual Review - Page 2**.

Action Required? *

Yes No

3. The form has been digitally signed and dated in **Monitoring Record** by the **School Principal** and **SENCo**.

SENCo Signature Please type the name to sign here	Date of Signing dd/mm/yyyy
Principal Signature Please type the name to sign here	Date of Signing dd/mm/yyyy

4. Only when the form is complete, click

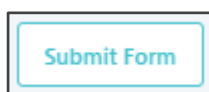


5. Click

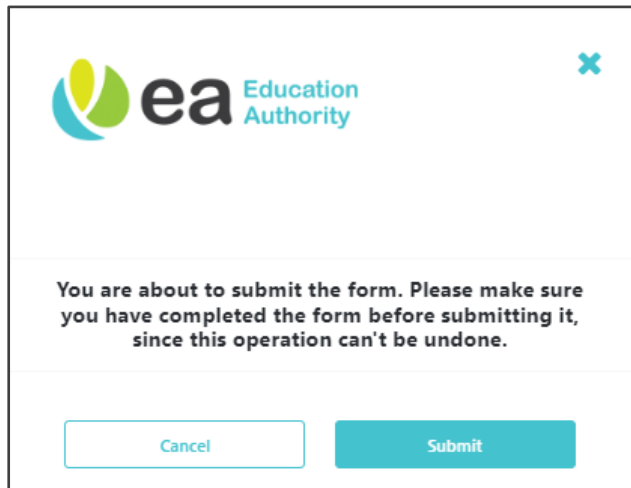



Note: This will change the status on the **Annual Review** Screen from **Meeting Scheduled** to **Meeting Heard**.

6. At the top of the screen, click



7. Carefully read the pop-up screen. When the form is submitted it cannot be undone.



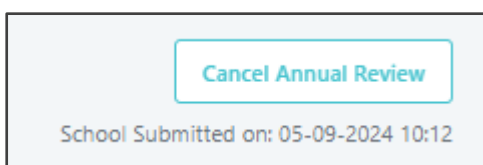
8. Click  only when you are sure the form is completed correctly.


Note: After clicking **Submit** the form will be locked for editing and you will no longer be able to make any changes.

9. The following message will appear at the top of the screen:



10. The date and time the school submitted the Annual Review will be shown at the top right of the screen:



11. The final form may be downloaded by clicking .

12. Click  to return to the **Annual Reviews** screen.

13. The Annual Review will show as **School Complete**.

Note: If you are unable to mark the Annual Review as **School Completed**, you have not scheduled the Annual Review using the calendar screen.

Note: SARS review all Annual Reviews on EA Connect. The SEN Link Officer has the final decision on the meeting outcome. Once SARS marks an Annual Reviews as completed on EA Connect, parents receive an automated email with the outcome. Parent can log into EA Connect to view and download a digital copy of the Annual Review Form.

Requesting EP Involvement

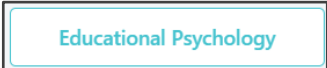

For all pupils, you must select if EP involvement is required.

There are two ways Schools can request Educational Psychology Involvement.

- Within the pupil Annual Review form ([page 9](#)).
- From the Annual Reviews summary screen (see below).

Once selected, this sends an automated email to the EP who will add the child to their case load.

If you are unable to select EP involvement, the EP has already assigned the child to their case load.

1. From the **Annual Reviews** summary screen, click .
2. Against the pupil's name, click .
3. The **Confirm Involvement** pop up will appear, with the below warning message, select as appropriate.

i This is the final SEN Stage 5 pupil on your list to request Education Psychology involvement. Once completed your EP will automatically receive an email containing a list of pupils for whom you have requested EP involvement. Are you sure you wish to proceed?

Please select one of the two options below:

Educational Psychology involvement requested for this Annual Review

Educational Psychology involvement NOT requested for this Annual Review



4. If you select **Educational Psychology involvement requested for this Annual Review**, the below message will appear,

Please select one of the options below:

School/parent/carer identifies a new SEN with supporting evidence;

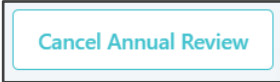
School or SARS request it because there is a significant change in the pupil's SEN or there is clear evidence that the current placement type is no longer meeting the child's SEN (i.e. child needs to move from mainstream to special or vice versa);

An Educational Psychologist (EP) has indicated there is a requirement for involvement.

- Click .
- The following green banner appears .
- The Involvement will be automatically updated on the pupil **Annual Review**.

Cancel an Annual Review

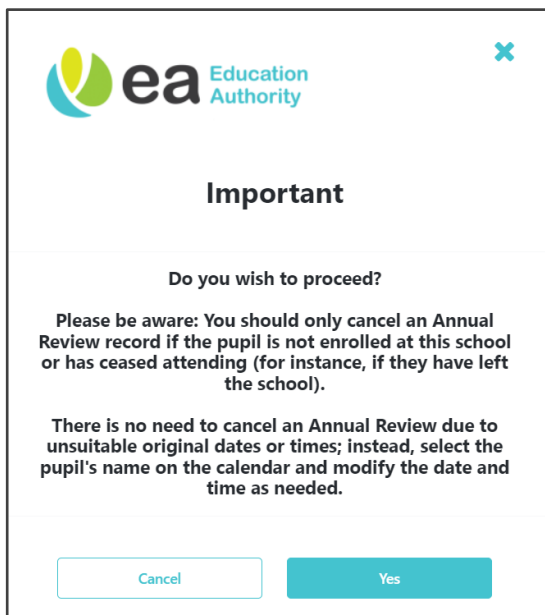
- From the **Annual Reviews** summary screen, click on the **Student ID** or **Annual Review Number**.

- At the top of screen, click .

- Important** pop-up window appears,

Note: You should only cancel an Annual Review record if the pupil is not enrolled at this school or has ceased attending (for instance, if they have left the school).

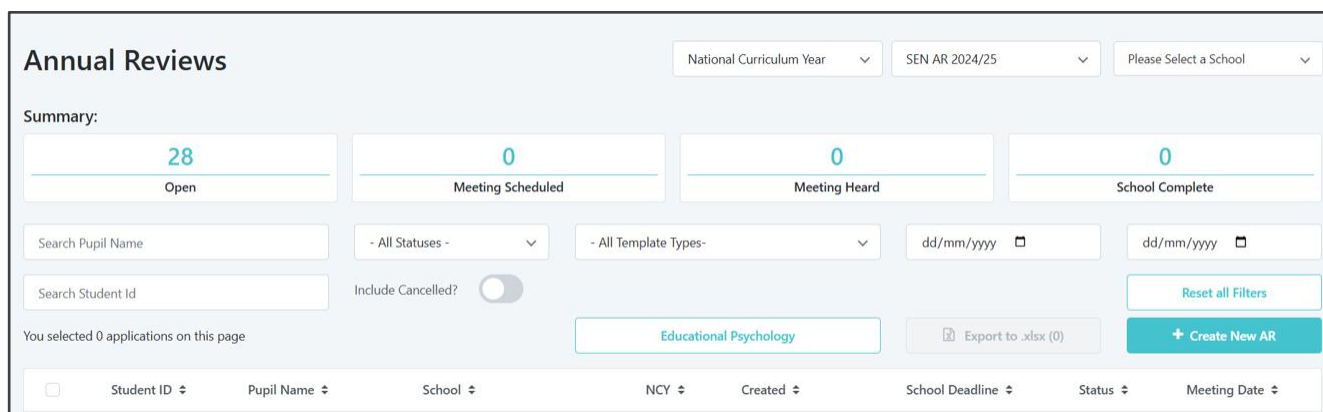
There is no need to cancel an Annual Review due to unsuitable original dates or times; instead, select the pupil's name on the calendar and modify the date and time as needed.



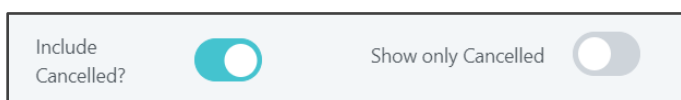
- Click  .

Reactivate an Annual Review

- From the Annual Review Dashboard, you can use the **Include Cancelled?** toggle .




- Once selected, you will see the **Show only Cancelled** toggle.



- Use the toggle **Include Cancelled?** to show the cancelled Annual Reviews in the summary table.

4. Use the toggle **Show only Cancelled**, to show only the cancelled Annual Reviews in the summary table.

5. From the **Annual Reviews** summary screen, click on the **Student ID** .

6. At the top of screen, click  .

7. **Are you sure you wish to Re-activate this Annual Review?** pop-up appears.

8. Click  .

9. Annual Review is reinstated.