

14. Parent Carer Guide: Education Health and Care Plan (EHCP) Phase Transfers

About this guide: This guide explains how [the EHCP Team](#) supports children and young people with [Education, Health and Care Plans](#) when they are moving to a new phase of education. This is often called a phase transfer.

What is a phase transfer?

A phase transfer is when a child or young person moves from one stage of education to another. This may include moving from early years to school, infant to junior school, primary to secondary school, secondary school to post-16 education, or from one post-16 setting to another.

What the EHCP Team will do

The EHCP Team will work with you, your child or young person, their current education setting and other professionals to plan for the move. We will use the [annual review](#) and any updated information to consider whether the EHCP is still an accurate reflection of your child or young person's needs and what support will be needed in the next setting.

Your views and your child's views

Your views, and the views of your child or young person, are an important part of the phase transfer process. You will be asked about your preferred setting and any worries, questions or important information that should be considered when planning the move.

Further information on settings in Shropshire can be found [here](#).

How settings are consulted

Where a setting is being considered, the EHCP Team will consult with that setting, usually they have 15 days to respond. This means we will share relevant information with them, which will include, a copy of the EHCP, the latest annual review documentation and other professional reports which are pertinent. We will ask the setting whether it can meet the child or young person's needs.

The setting will consider:

- Whether they can meet your child's special educational needs.
- Whether admitting your child would affect the education of other pupils.
- Whether the placement would be an efficient use of resources.

- Whether admitting your child would be incompatible with the efficient education of others (and whether reasonable steps could overcome this).

We will consider the response alongside the information available and the legal duties that apply to the Local Authority.

More information on legal duties can be found here:

<https://www.ipsea.org.uk/faqs/consultation>

Key dates

Transfer type	When the final amended EHCP should be issued
Most phase transfers, such as primary to secondary school	By 15 February in the year of transfer
Transfer from secondary school to post-16 education or training	By 31 March in the year of transfer
Transfer from one post-16 setting to another at another point in the year	At least five months before the transfer takes place

So that EHCP Team can be timely and try to meet these deadlines, the annual review may need to be completed before it would have been due. The Local Authority ask that phase transfer annual reviews take place before the end of October. Sometimes these are at the end of the previous academic year, so may have already taken place before this.

What happens during the process?

1. The EHCP Team identifies children and young people who are due to move to a new phase of education.
2. The annual review is used to look at progress, needs, support, outcomes and preparation for the next setting.
3. Your views and your child or young person's views are gathered and recorded.
4. The EHCP Team considers whether the EHCP needs to be amended.
5. Appropriate settings are consulted where needed.
6. A draft amended EHCP will be shared with you for comments.
7. The final amended EHCP is issued by the relevant statutory deadline.
8. Planning continues with the new setting so that transition arrangements can be supported.

How we will communicate with you

We will aim to communicate with you in a clear, respectful and timely way. We will explain the process, key dates and next steps, and we will let you know if there are any

issues that may affect the progress of the phase transfer. If you are unsure about anything, you can contact the EHCP Team for clarification.

What happens if these deadlines are missed

We recognise that where the Local Authority does not meet statutory deadlines, this can cause uncertainty and additional stress for families, and we are sorry where this happens. We will continue to progress the phase transfer as quickly as possible and will keep families informed about the next steps wherever we can. If you need advice or support while you are waiting, you can contact SENDIASS Shropshire for free, impartial information and guidance on 01743 280019 or by email at iass@cabshropshire.org.uk . You can also contact PACC Shropshire for parent carer support and resources by emailing info@paccshropshire.org.uk . For queries about your child or young person's EHCP, please contact the EHCP Team on 01743 254267 or by email at ehcpteam@shropshire.gov.uk.

If you have concerns

If you have concerns about the proposed setting, the support in the EHCP, the transition arrangements or the progress of the phase transfer, please contact your allocated EHCP officer as soon as possible. Raising concerns early helps us understand what is worrying you and consider what further action may be needed.

Our commitment

We understand that moving to a new setting can feel significant for children, young people and families. The EHCP Team is committed to working with you and other professionals to support careful planning, clear communication and a smooth transition wherever possible.

Further Information

SENDiass Shropshire- Transition, Transport and Timetabling-

<https://www.shropshiresendiass.com/transition-transport-and-timetabling-1>

PACC guide to consultations

<https://www.paccshropshire.org.uk/wp-content/uploads/2026/04/PACC-Consultations-Information.pdf>

PACC guide to transitions in education

<https://www.paccshropshire.org.uk/wp-content/uploads/2026/04/PACC-Transitions-Guide.pdf>