

Warwickshire County Council

Setting request for an Education Health and Care Needs Assessment (EHCNA) Guidance



Guidance for completing the request form

All mandatory fields marked with an asterisk (*) must be completed with accurate information to proceed with the request.

Incomplete submissions may result in cancellation and require a new referral to be started.

You do not need to complete the form in one sitting. However, you must submit the referral before you can return to make edits.

This guidance document provides step-by-step instructions on completing the required fields during your initial session, as well as how to save, submit, and return later to finish the form.



Checklist

The first section of the form provides you with all the information you will be required to submit as part of the request.

To make the process smoother, we recommend gathering any relevant documents or details before you start. This will help you complete the form more easily and avoid delays.



Request Checklist -

The following provides an overview of the information required to compete this request - **Please note failure to complete all fields in the referral may result in the application being cancelled and a new application required.**
You can submit your application and return at a later date to complete and edit your responses.

Before final submission please ensure all fields are completed (unless optional) and include any uploaded documentation.

Section 3 - Child/young person personal details -

- Full name/preferred name
- DOB
- Sex at birth/gender identity/pronouns
- Ethnicity/Language
- Diagnosis and dates
- NHS and UPN numbers if applicable
- Parental responsibility
- Key parental/young person contact details and access requirements
- GP details
- Social care details

Section 4 - Setting information -

- Setting history
- Attendance and exclusion information
- any changes to timetable
- attainment (reading, writing, maths) qualifications
- SEN register dates
- Pupil premium

Section 5 - Other professionals -

- Information of any other involvement including, frequency, contact information.

Section 6 - Reason for Request -

- Areas of need
- Reason for request
- Evidence of graduated response (at least 2 cycles including monitoring and review)
- Exceptional circumstances

Section 7 - Costed interventions -

- Any interventions either recommended by professionals or implemented by the setting, their cost frequency and impact.

Section 8 - Consent and further information required -

- Email address of key parent/carer/young person contact

You will be required to upload any relevant information
Please only send the documents required

- Non WCC reports or letters of diagnosis
- A Family conversation
- Signed parental declaration
- Child views if applicable

Please do not send additional documentation such as behaviour logs, attendance reports, photo's, suspension letters, appointment letters, they are not required.

PLEASE CLEARLY NAME THE DOCUMENT WITH - WHAT IT IS, DATE OF REPORT, INITIALS OF CHILD i.e.

STS review 14-02-25 JB

Following submission of this form you will receive an automated email with a reference number please include this in your email.

First submission

Within the first sitting you will be required to complete sections 2 and 3 **in full**.

Section 2 – Setting requesting

- The setting submitting the referral
- The individual completing the form
- Key contact details and information about the completing setting and person

Section 3 – Child/young person details

- Full name/preferred name
- DOB
- Sex at birth/gender identity/pronouns
- Ethnicity/Language
- Diagnosis and dates
- NHS and UPN numbers if applicable
- Parental responsibility
- Key parental/young person contact details and access requirements
- GP details
- Social care details.



Setting request

1. Select the name of the setting completing this referral *
Please note that settings outside of Warwickshire will need to add the name in other

Select your answer

2. Is this referral a setting request or in response to a parental/professional request? *

☐ Education setting request

☐ Parental request

☐ Other professional

3. Please tell us the reason the school haven't made the referral themselves? *

Enter your answer

4. Key setting contact name *

Enter your answer

5. Key setting contact number *

Enter your answer

6. Key setting email address *

Enter your answer

7. What is the child/young person's current School Year *

Select your answer

8. Is the child/young person educated out of year group? *

☐ Yes

☐ No

9. For What Reason? *

Enter your answer

First submission

The only other section you are required to complete during your first submission is the final section of the form. This section allows you to:

- Save your progress
- Enable editing access should you need to return and complete any remaining fields later

You will also be asked to indicate whether this is your final submission. This helps us process your request as efficiently as possible.

If you are not completing the whole form in the first sitting, please ensure you select the **NO** option here

Warwickshire Setting Request for EHCNA

* Required

Consent and next steps

44. Is the request complete? *

Are all the sections finalised and all fields completed? (other than optional)

☐ Yes

☒ No

You can print a copy of your answer after you submit

[Back](#) [Submit](#)

Never give out your password. [Report abuse](#)

Once you hit submit you will receive this message: **Click on the box to save your response to edit.** If you don't already have an account, it will ask you to create one (once created you will not need to do this in the future).

Thank you your referral has been submitted.

If any further information is required we will be in touch otherwise you will receive communication once a decision has been made (within 6 weeks).

Kind regards
SENDAR

Important thing you can do next

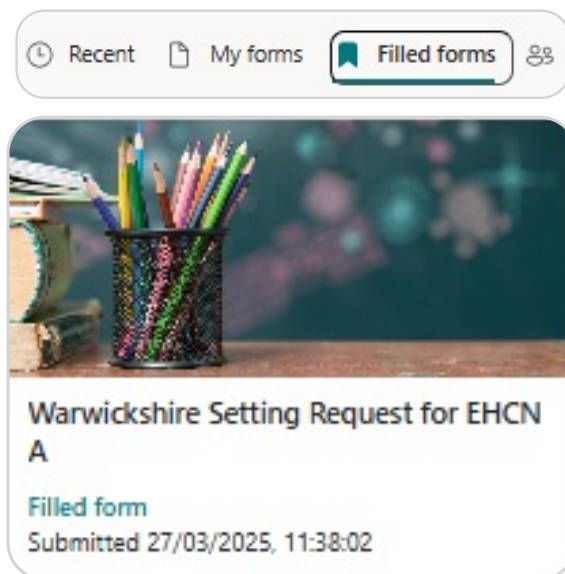
[Save my response to edit](#)

[Submit another response](#)



Returning to your request to continue with your submission

Step 1. Once logged in to Microsoft forms you will enter a home page like this click on filled forms and the submitted forms will show



Step 2. Click on the form you require, and you will then be able to view responses



Step 3. In the top right-hand corner, you will have a button that allows you to edit your responses

 **Edit response**

Please remember to select submit if you need to leave the form and return to ensure your changes are saved



Final submission

Once you have completed the whole form and are ready to submit you will be asked to provide a final few details and to confirm submission.

Following submission of this form you will receive an automated email with a reference number.

Email any supporting documents to sen@warwickshire.gov.uk

- Reports or diagnosis letters
- Family conversation (New online version)
- Signed parental declaration
- Child views if applicable

PLEASE NOTE WE DO NOT REQUIRE ANY OTHER DOCUMENTATION SUCH AS:

- Behaviour logs
- Attendance reports,
- Photo's,
- Suspension letters,
- Appointment letters etc.

PLEASE NAME YOUR THE DOCUMENTS CLEARLY IN THE FOLLOWING FORMAT:

- What is is (eg) STS Review
- Date of report (14-02-25)
- Intitals of child (JB)

Provide an email address for the parent/carer/young person so we can send them confirmation of the request.



Please ensure you change the request to complete this lets us know that the submission is complete.

Consent and next steps

55. Is the request complete? * ☐

Are all the sections finalised and all fields completed? (other than optional)

☒ Yes

☐ No

56. I confirm that all information provided in this form is correct to the best of my knowledge. * ☐

☐ Yes

☐ No

57. **Please confirm you have emailed your supporting documentation to sen@warwickshire.gov.uk** * ☐

This may include
Any relevant diagnosis letters
Any private (non WCC) reports
Family conversation
Child views (if applicable)
Signed parental/young person declaration

Please do not send additional documentation such as behaviour logs, attendance reports, photo's, suspension letters, appointment letters, they are not required.
PLEASE CLEARLY NAME THE DOCUMENT WITH - WHAT IT IS, DATE OF REPORT, INITIALS OF CHILD i.e.
STS review 14-02-25 JB
Following submission of this form you will receive an automated email with a reference number please include this in your email.

☐ Yes I confirm I have emailed supporting documentation

58. **Please provide the email address of the parent/carer or young person 18+. We are legally required to inform them we have received this referral.** * ☐

Please enter an email

59. **Please note an application with missing information/fields will be unable to be processed and could result in the referral being cancelled and a new referral would be required.** * ☐

☐ I confirm I understand and have submitted the required information

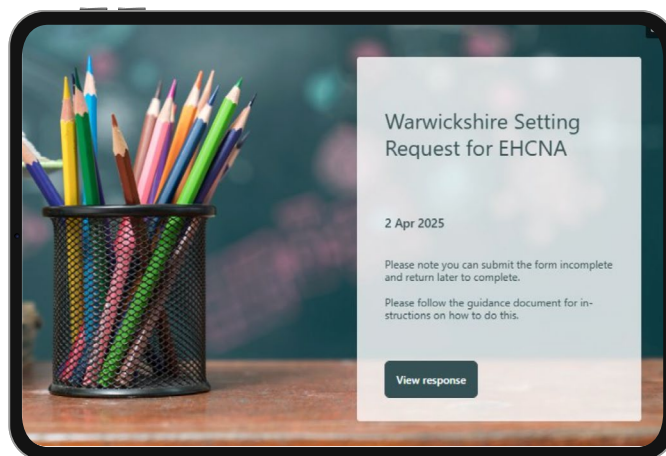
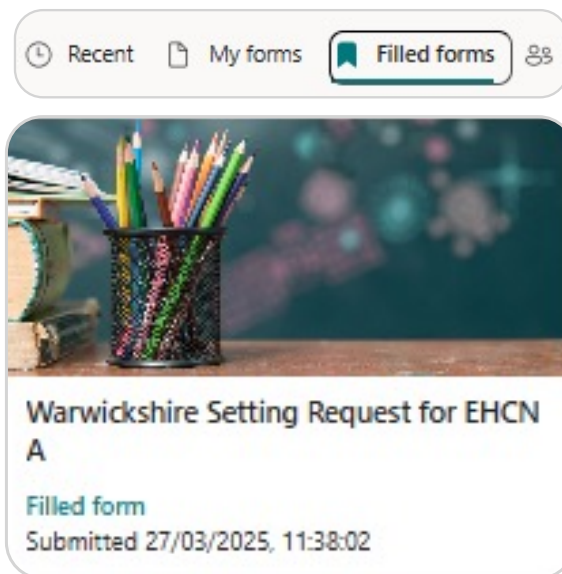
You can print a copy of your answer after you submit

Saving your request as a PDF document

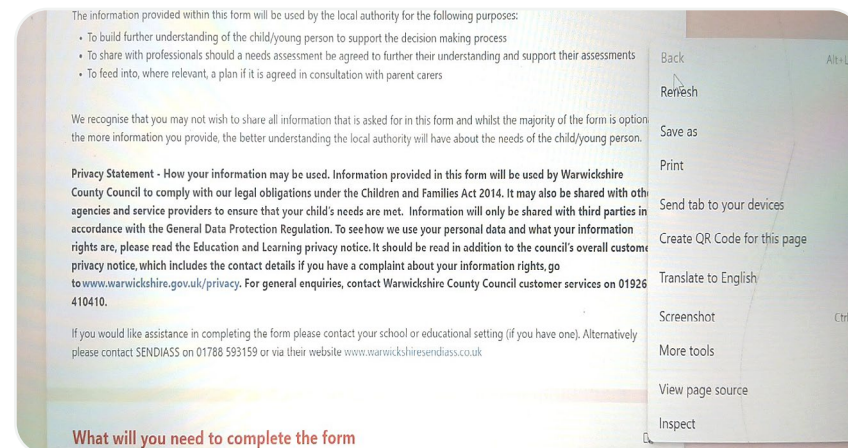
Step 1. Once you have completed your submission you can save your request as a PDF document, should you wish to.

To do this, to go your filled forms and click on the relevant form you want to save as a PDF.

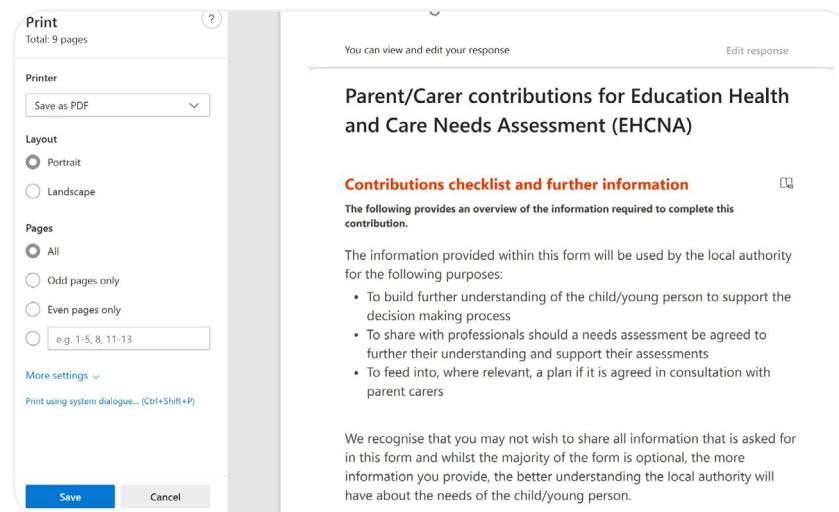
Step 2. Click on the view responses tab at the bottom of the page.



Step 3. Right click on your mouse and it will give you an option to print.



Step 4. Where it says printer (left hand side of your page), it will give you a Save as PDF option in the drop-down filter. Save as PDF and then press save.



Replacement of Family Conversation

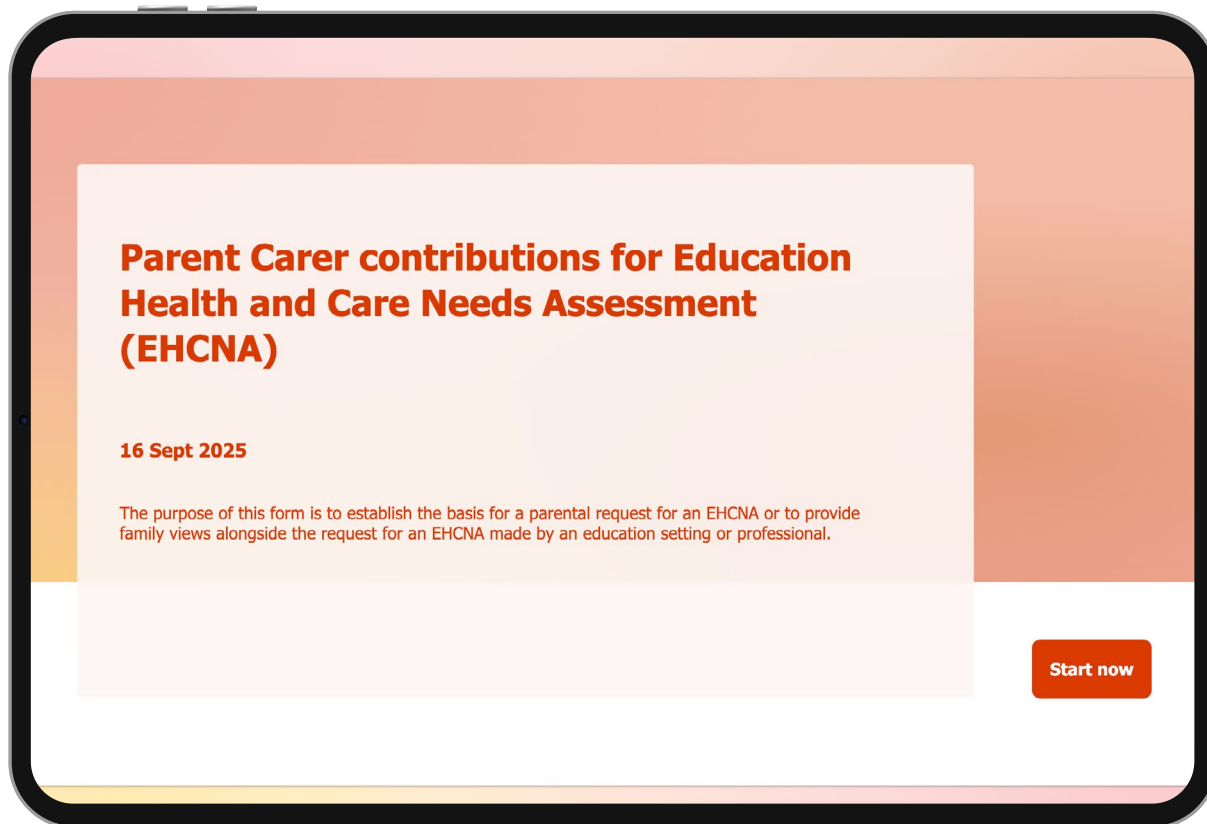
The previous SEN05 Family Conversation has now been replaced by an online Microsoft Form, available at: www.warwickshire.gov.uk/parentcarerehcnarequest

How Should This Be Completed?

Depending on the needs and preferences of the family or young person, there are several ways you might approach completing the form:

- Complete it together during a meeting with the family
- Talk through the questions with the family and then share the link for them to complete independently
- Signpost the family to support services such as SENDIASS or the Family Information Service for help with completing the form

A word version of the form is available if needed, however, should only be used in exceptional circumstances.



The screenshot shows a Microsoft Form interface. The title is 'Parent Carer contributions for Education Health and Care Needs Assessment (EHCNA)' in bold orange text. Below the title is the date '16 Sept 2025'. A paragraph explains the purpose: 'The purpose of this form is to establish the basis for a parental request for an EHCNA or to provide family views alongside the request for an EHCNA made by an education setting or professional.' In the bottom right corner, there is an orange button labeled 'Start now'.

