

Station Number

AFFIX CANDIDATE  
LABEL HERE

CANDIDATE No:.....

### Instructions for Candidates

#### Scenario

You have been asked to see Alice Jones, who is a 74-year-old woman with a recent diagnosis of mild Alzheimer's disease. She lives with her husband. She wishes to make her will.

#### Instructions

Take an appropriate history (and relevant mental state examination) to assess her Testamentary Capacity.

**PLEASE REMEMBER TO HAND YOUR IDENTITY LABEL TO THE  
EXAMINER**

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History Taking: Testamentary Capacity

CANDIDATE No:.....

### Instructions for Patients

**Answer questions based on the following scenario.**

**Do not volunteer information unless asked.**

This station tests the candidate's ability to assess the capacity of someone to make a will.

You are Alice Jones, a 74-year-old woman who lives with her husband.

#### Key Attributes

During the interview, it should be evident that you have some problems with your memory (as outlined below). You are allowed to write down the details of your estate, as your character will be referring to her notebook.

#### Your estate

You have:

1. A share portfolio of approximately £18,000
2. Savings of £6,000
3. A house that cost about £60,000 (you are not sure) fifteen years ago. You don't know its current market value
4. Furniture valued 12 years ago at £8,000
5. A timeshare in Spain that cost £4,000

Your wishes are that:

1. The house goes to your husband
  2. £1,000 to each of your grandchildren
  3. £3,000 in shares to your children. You only want to give £1,000 to your other son.
  4. £8,000 goes to charity. You want half of this to go to Marie Curie cancer centre (your mother died of cancer), and half to the RSPCA (you think that you used to like animals, but you can't remember owning pets)
- You can't remember where the papers are, or which bank your savings are in
  - You know the approximate values because you wrote it down in your notebook.

#### Personal History

- You have a stable marital relationship.
- You ran your own business before retirement and were the main 'breadwinner' in the family

- You have two sons and a daughter, all of whom are married. You have 5 or 6 grandchildren (you can't remember exactly). You get on well with two of your children but fell out with one of your sons over 10 years ago over arguments about the business. You can't remember the name of the son you don't get on with.

**Mental State**

- You are not sure of the exact date or month. You know the year
- You know your address, but can't remember the house number (you get it mixed up with your first house)
- You can register and recall three objects, but there is a slight delay in remembering the third.

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History Taking: Testamentary Capacity

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### Instructions for Examiners

***REMEMBER TO ASK THE STUDENT FOR THEIR IDENTITY LABEL AND  
AFFIX IT TO THE TOP OF THE MARK SHEET.***

This OSCE station tests the candidate's knowledge of testamentary capacity. To pass, the candidate will have to demonstrate:

1. Knowledge of criteria for testamentary capacity
2. Ability in asking appropriate questions relating to capacity

Station Number

Examiner's Name:

.....

AFFIX CANDIDATE  
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CANDIDATE No:.....

History Taking: Testamentary Capacity

### Marking Sheet

*Please circle the appropriate mark for each criterion. The standard expected is that of a psychiatric Senior House Officer.*

Criterion	Performed competently	Performed, but not fully competent	Not performed		
<b>Approach to the patient – Rapport, empathy, and style</b>	3	1 ½	0		
<b>Does patient understand what a will is, and what it means?</b> <ul style="list-style-type: none"> <li>• Includes awareness of the consequences of leaving a will</li> </ul>	2	1	0		
<b>Is patient aware of the nature and extent of their property?</b> <ul style="list-style-type: none"> <li>• This does not have to be detailed knowledge, but a general one, for example: ownership of a house, car, furniture, etc.</li> </ul>	3	1 ½	0		
<b>Does patient know the names of, and relevant claims of, relatives?</b> <ul style="list-style-type: none"> <li>• Can the patient recognise, remember, and assess the claims of relatives?</li> <li>• Is this reasonable and consistent?</li> </ul>	3	1 ½	0		
<b>Is there an abnormal state of mind that would affect the testator's judgements?</b> <ul style="list-style-type: none"> <li>• Includes paranoid beliefs about relatives or friends</li> <li>• Does cognitive impairment affect patient's awareness of possessions or relatives?</li> </ul>	3	1 ½	0		
States that they would come back at a later date to reassess the patient	2	1	0		
<b>Overall Approach to Task</b>	4	3	2	1	0

Score (Max 20)

Overall Grading of station

Clear Pass

Borderline

Clear Fail