

Managing Tasks from External Organisations – SystmOne Task Rule

(Last updated 13/11/2025)

This is a quick guide to show you how Tasks sent by External Organisations to individual staff members/unassigned can be automatically redirected to a Team/User Group by creating a Task Rule on SystmOne.

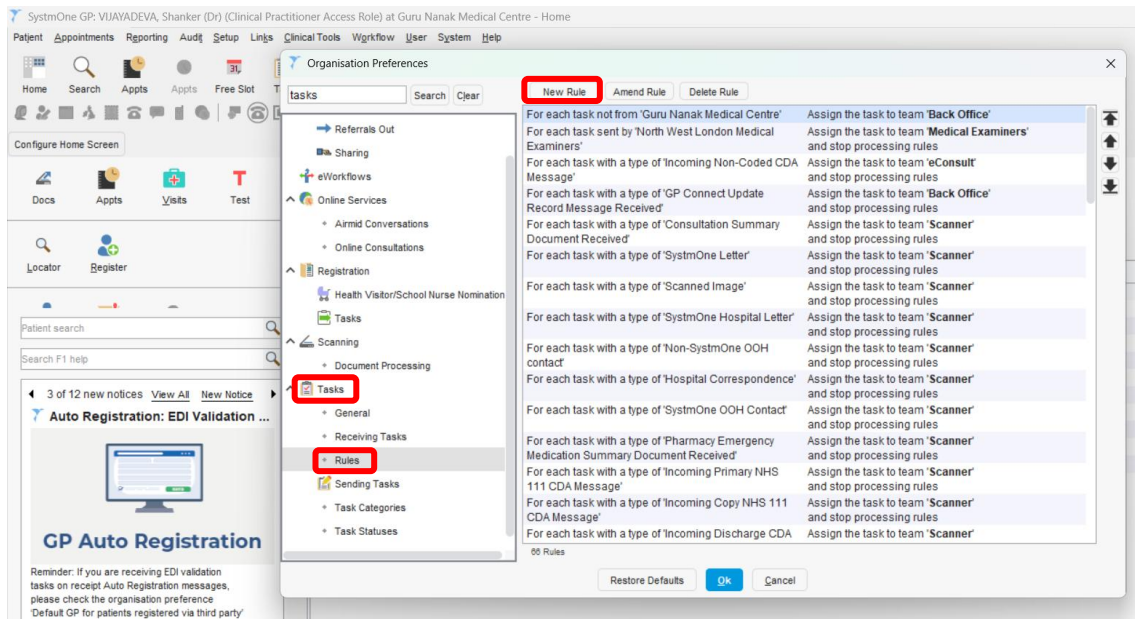
This can reduce the risk of delay in spotting a Task if a staff member is away etc.

TIP: Consider whether you want to ‘cut and paste’ the content of Tasks into the Tabbed Journal if this would help with increased visibility of the Task content in the patient’s record (e.g. to make it easier for the patient to see online OR to keep content if patient changes to a different GP practice in the future that does not use SystmOne).

1) Select: **Setup** → **Users & Policy** → **Organisational Preferences**

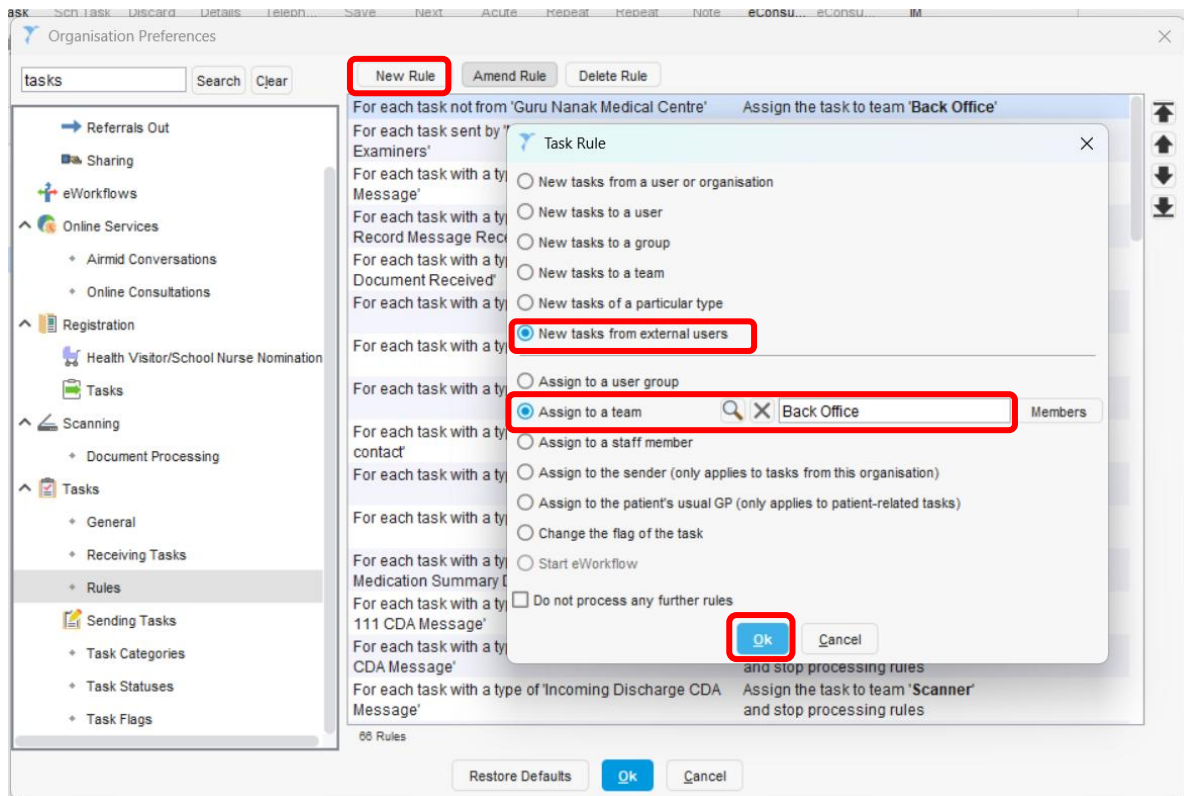
The screenshot shows the SystmOne GP interface for a user named VIJAYADEVA, Shanker (Dr). The top navigation bar includes links for Patient, Appointments, Reporting, Audit, **Setup**, Links, Clinical Tools, Workflow, User, System, and Help. The **Setup** menu is open, showing a list of options: Users & Policy, Prescribing, Vaccinations, Appointments, Data Entry, Data Output, Reference, Referrals & Letters, Mobile Working & Integration, Workflow Support, Bulk Operations, and Data Conversion. The **Users & Policy** option is highlighted with a red box. The **Organisation Preferences** option is also highlighted with a red box. The interface also shows a sidebar with icons for Home, Search, Appts, Docs, Appts, Visits, Locator, and Register. At the bottom, there is a section for '3 of 12 new notices' with a 'View All' link and a 'New Notice' button. A notice titled 'Auto Registration: EDI Validation ...' is visible, featuring a computer monitor icon and the text 'GP Auto Registration'.

2) Select: **Tasks → Rules → New Rule**



- 3) Select
- a) **New tasks from external users**
 - b) **Assign to a 'team'* or 'user group'**
 - c) Use Drop down to select team/user group (e.g. reception/admin)
 - d) **OK**

*NB: SystmOne recommends practices switch from using 'User Groups' to 'Teams'



- 4) Probably best to move position of Task rule to top of order (select rule and use arrows on right to move position) and leave it with ability to process further rules (as screenshot above)

Dr Shanker Vijay

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