

Allocate ActivityManager

Service Definition

G-Cloud 15

Table of Contents

1 Introducing RLDatix3

2 Allocate ActivityManager.....4

3 Implementation & Onboarding7

4 The RLDatix Support Package10

5 Security & Privacy13

1 Introducing RLDatix

RLDatix is a global leader in workforce and risk management solutions. Our solutions are designed specifically for healthcare. Over 6,500 organisations rely on our technology, to create safer, more effective, and more sustainable ways of working. Whether supporting a single service or a national healthcare system, our purpose is simple: to help organisations raise the level of care. We do this by improving how staff are supported, deployed, and empowered.

Our Purpose

High quality care depends on staff who can work safely, confidently, and efficiently. Our solutions strengthen safety, governance, and operational performance—while also protecting staff wellbeing. By reducing manual processes and improving transparency, we ensure organisations achieve fair, compliant, and equitable rostering that supports both service needs and work–life balance. Our intuitive design and data driven insights promote better decision-making and create environments where staff thrive, ultimately improving patient experience and outcomes.

Who We Serve

With over 30 years of healthcare experience, RLDatix supports organisations operating in some of the most complex and regulated environments globally. Our customers range from small independent providers to national organisations with workforces exceeding 100,000 staff. This includes acute, community, mental health, disability, and outpatient services across the UK, Ireland, Europe, North America, Asia Pacific, and beyond.

The Impact We Deliver

RLDatix solutions support the rostering and management of more than 2.5 million healthcare staff globally. By helping organisations shift from manual and fragmented processes to consistent, data driven workforce planning, we enable better use of resources, stronger governance, and improved staff experience. Our technology ensures healthcare systems reduce agency reliance, respond to demand pressures, and maintain safe, high quality care always.



2 Allocate ActivityManager

Your clinical activity. Efficiently and safely deployed.

ALLOCATE ACTIVITYMANAGER is a major **rostering extension** that supports the most complex of rosters, including theatres, surgeries, clinics, and more. Instead of focusing on individual people and what time they are carrying out their duties, ActivityManager shifts the focus onto the **clinical activities** that are actually occurring and whether or not they are safely staffed.

The system achieves this by introducing a new concept, an **activity**, which comprises individual duties to ensure an activity can go ahead, for example, all the duties that are required to perform a theatre list. ActivityManager schedules any clinical Activity (for example, clinics, theatre sessions, radiology, anaesthetists, emergency departments), assigns a lead or principal to that Activity (typically a consultant) and then, based on profiles defined by the organisation, assigns supporting staff from different rosters and staff groups to the Activity as well. Supporting staff can include junior doctors, AHPs, Nurse specialists, OPDs, and more. In doing this, ActivityManager allows organisations to safely deploy the **appropriately skilled staff to the correct locations** and does this in the most efficient way for clinical activities.

Key Features

Created specifically for clinical activities, ActivityManager contains many features designed to support organisations when managing complex clinical duties and the various staff carrying them out. These features include:

- **Powerful Reporting and Organisational Insight** – The system allows organisations to understand exactly what clinical activity is being delivered and what has been completed or cancelled.
- **Activity-Based Demand** – This refers to the ability to create Activity Profiles, which store the demand for a particular activity type.
- **Contracted Activities** – The ability to store contracted activities for each consultant. As well as any agreements such as flexi in year balance, custom reference periods and ideal balance as the job plan progresses.
- **Extensive Visibility** – The system allows organisations to understand who is delivering which activities, in what quantities, and to see the impact that leave and absences make to clinical activity.



- **Supporting Medics on the Move** – The system allows Medics to see not just when they are working, but also what they are working on and who is working with them.
- **Integration with Allocate BankStaff+** – By integrating with our locum management and bank system, **ALLOCATE BANKSTAFF+**, organisations can ensure that all activities with vacant duties are filled.
- **Integration with Allocate JobPlan** – By integrating with our job planning solution, **ALLOCATE JOBPLAN**, the system allows for the cross-referencing of contracted versus delivered consultant activity.

Key Benefits

As a result of its unique features and focused design, ActivityManager is an incredibly powerful tool and provides your organisation and teams with several key benefits such as:

- Dramatically improving productivity by ensuring that resources are redeployed if no longer needed.
- Improving safety by having visibility of any unfilled duties required for an activity to safely go ahead.
- Providing consultants with confidence that they will have the right team around them (including junior doctors, AHPs and nursing) to deliver patient care.
- Helping organisations to achieve financial savings and safeguard quality by reducing locum reliance.
- Reducing the number of cancelled clinical activities, such as clinics and theatre sessions.
- Improving the patient experience by avoiding last minute cancellations.

Integration with Allocate Optima and ESR

When used in conjunction with our rostering solution, **ALLOCATE OPTIMA**, ActivityManager takes traditional e-rostering one step further and has a number of significant impacts across the rostering system such as:

- **Integrated Rostering** – Staff are planned around a single clinical objective and location with ESR integration.
- **Activity-Based Demand** – Users can create Activity Profiles storing the demand for a particular activity type, i.e., primary and support duties are needed to run an activity and whether they are mandatory/optional. These are then added to Service Plans or Demand Patterns which state when a particular Activity Profile is due to occur.
- **Activity Actions** – Actions to change an Activity, for example, cancelling, changing location, or filling unfilled parts of an Activity.



- **Activity Diaries** – Diary views that enable users to manage the roster from an activity focus. These show the activities that are due to occur, whether they are correctly staffed, and who has been assigned. This changes the emphasis from what an individual is doing to what activities are happening and if they are appropriately staffed. These diaries can be filtered in a variety of ways for a more specific view.
- **Activity Markers and Colours** – You can add them to Activities on Diary views to highlight key information about the activity. This helps ensure staff are fully informed about the activity taking place.
- **Reference Data** – Users can group the activities that will be rostered into Activity Types, which can then be grouped into Activity Groups, and then further grouped into Activity Categories Activity Reports.
- **Enhanced Reporting** – Users can report on the extra data held in ActivityManager. For example, running reports on the number of cancelled duties which can then be further categorised by activity type, reason, or consultant. Reports can even be run to compare contracted activities with those that have actually been delivered.

Integration with Allocate Loop

Allocate Loop is a next generation app that is replacing our previous employee portals, EmployeeOnline and MedicOnline. Loop is **the bridge between staff and all RLDatix workforce solutions**, and is available **free of charge** to all customers, therefore providing users with greater control over their hours, absences, and staff record.

Loop has been designed exclusively for frontline staff, to make any work-life task quick and simple to do. From checking their shifts and requesting annual leave, to booking the shifts they want to work, it takes just a few clicks in the app. Whether your people are tech experts or tech novices, any member of the team will be able to take control of their work life balance.

Loop's two-way communication features makes engaging people across your organisation simple and safe, enabling colleagues and teammates to connect with each other, stay up to date on the latest news, and feel part of the community.



3 Implementation & Onboarding

Our extensive experience, supporting organisations of varying scale and complexity, ensures that our solutions and implementation approaches remain highly flexible and responsive. Our implementation approach is built on a structured and proven methodology designed to accelerate time to value from day one.

By combining a clearly defined delivery framework with early stabilisation activities, and a strong focus on measurable benefits, we ensure that every programme establishes the foundations for long term success from the outset, and that our delivery programme remains benefits led.

RLDatix's Implementation Methodology

Our project approach (EQUIP) is designed to ensure the successful implementation of the RLDatix product suite, delivering measurable benefits while meeting the unique needs and priorities of the organisation. At its core, our methodology is structured, collaborative, and adaptable, ensuring a seamless transition and alignment with your strategic goals.

The EQUIP Business Transformation model is a structured framework equipping organisations with sustainable transformational changes that drive real, measurable benefits. It is particularly effective in identifying opportunities for optimisation across business units, functions, or strategic areas, ensuring that transformation is meaningful, measurable and sustained. Each EQUIP-led engagement includes:

- A clear case for change and agreed scope (Evaluate)
- Quantified benefits statements (Quantify)
- A structured implementation plan with governance checkpoints (Understand & Implement)
- A continuous improvement framework underpinned by reporting and data (Protect & Sustain)

E**Evaluate the opportunity**

Work collaboratively to assess current state and define priority transformation objectives

Q**Quantify the opportunity**

Establish clear, measurable success metrics aligned to organisational goals

U**Understand and define the pathways for transformation**

Develop targeted pathways for workforce, clinical and operational transformation

I**Implement the solution**

Executive change initiatives and deploy supporting RLDatix technologies and services

P**Provide a sustainable, tangible benefit**

Drive long-term value realisation through continuous improvement, capability building, and outcomes tracking



Stakeholder engagement is central to our strategy, fostering a partnership that prioritises communication, feedback, and collaboration at every stage. Through a combination of workshops, training sessions, and hyper care support, we ensure the platform is fully embedded within your organisation, enabling end users to confidently utilise its full potential.

Our Delivery Principles

- **Customer-Centric Outcomes** – Every engagement is focused on delivering measurable value. We ensure flexibility, responsiveness, and minimal disruption to ongoing operations.
- **Quality and Continuous Improvement** – We maintain a strong commitment to consistent delivery, underpinned by the 'RLDatix Way'. Feedback loops during and after delivery drive ongoing enhancements.
- **Teamwork and Partnerships** – We work openly and collaboratively with our customers, colleagues, and third parties to build strong, mutually beneficial partnerships.
- **Technology-Enabled Delivery** – We leverage technology to accelerate delivery, enhance quality, and reduce risk.

All projects delivered by RLDatix are carried out using our Applied Project Methodology which is comprised of four high-level milestones as part of the project; these include:



Readiness

Working with you to ensure that you are in the best position to maximise the impacts of our solution



Deployment

Technical configuration, operational workshops, and transferring knowledge/skills, enabling you to establish a solid foundation for continued implementation



Adoption

Supporting you to continue implementation and helping your active units achieve best practice



Realisation

Using system information to embed best practice across all units to deliver continuous improvement

Our methodology allows us to implement your products to work around how you operate, while focusing on best practice processes and maximising knowledge transfer to ensure a seamless handover of ownership.

Training & Support

Expert training and access to our customer team is included as standard. Implementations are delivered using our proven, effective 'train the trainer' programme; this enables the development of your own training function. This maximises skills and knowledge transfer, and the sharing of best practice, ensuring that your Project Team can repeat the training and manage, maintain, and support the platform into BAU.



We will guide your team throughout implementation to help change to remove outdated processes and identify areas of improvement, maximising the benefits to you of our solution and the experience of our team.

Post implementation, there are training resources and courses available free of charge via the **RLDATIX ACADEMY**, regularly maintained and updated aligned to product changes.

Should clients have any questions regarding the system or require assistance with understanding success with different specialities, the team will be readily available to support.

- Ongoing training via the **RLDATIX ACADEMY**, designed to provide organisations with the formal training and accreditation needed to ensure they have the confidence and skills to utilise their implemented systems.
- Foundation refreshers via our **BACK-TO-BASICS HUB**, to help refresh individuals on the core foundations of key topics relevant to their area of expertise.
- Community and voice through our **REGIONAL USER GROUPS**. To foster community and shared learning amongst our customers, RLDatix hosts independently chaired national and regional user groups which are open to all RLDatix customers from across the global community. Their purpose is to drive the sharing of support, knowledge, and best practice across organisations and regions, as well as giving customers the opportunity to directly influence the development of our solutions and services.
- Continuously updated, comprehensive **SYSTEM DOCUMENTATION**, including full supporting technical documentation for the system and components. End-user guides and product documentation are also updated relative to version changes and product development cycles.

Using the training/user materials provided during implementation, and the training and resources shown above, your team will be self-sufficient and able to deliver additional or refresher training to subsequent users and design and maintain a localised training programme using standard RLDatix or their own bespoke support and reference materials. This represents best value for money to you as you should not need to rely on additional, costed training also available from RLDatix.

RLDatix prides itself on its customer support and training services – we also typically offer the following:

- Guidance and support through our **CUSTOMER SUCCESS TEAM**, ensuring customers gain maximum value and benefit from their implemented solutions, and that organisations are achieving their desired outcomes.
- Partner on setting goals to increase value and adoption.
- Advocate for you internally and drive positive outcomes.



4 The RLDatix Support Package

At RLDatix, we place great importance on building strong, long-lasting relationships with our customers. We understand that healthcare organisations operate in complex, fast-moving environments, and our goal is to ensure you always feel supported, confident, and equipped to get the best from your RLDatix solutions.

Alongside regular **CUSTOMER SUCCESS** reviews and access to the **RLDATIX ACADEMY**, you will have a dedicated **ACCOUNT MANAGER** and **CUSTOMER SUPPORT** team. Together, these teams form an integrated service designed to help you maximise value, strengthen governance, and continually improve the quality and safety of care.

We combine deep healthcare expertise with a proactive, customer-centred approach. Whether you're navigating operational pressures, adapting to new service demands, or enhancing workforce performance, we work closely with your clinical, operational, and digital leaders to help you make effective, data-led decisions. Through structured engagement, responsive support, and ongoing insight, we aim to be a trusted partner at every stage of your journey with us.

Account Management

Our Account Management team acts as a long-term strategic partner for your organisation. Their role is to build a detailed understanding of your operating model, workforce challenges, and priorities, so they can provide practical, tailored guidance that delivers real value.

Your Account Manager will:

- Meet with you regularly to review agreed KPIs and SLAs
- Share insights drawn from comparable health systems
- Recommend opportunities for optimisation or cost efficiencies
- Keep you informed about new features, enhancements, and innovations
- Act as your escalation point for any issues or concerns
- Ensure your feedback directly informs our product and service improvements

By focusing on continuity and open communication, your Account Manager will help you to adapt to evolving pressures, improve efficiency, and get the most from your RLDatix solutions over time.



Customer Success

Our dedicated Customer Success team is committed to ensuring you achieve meaningful, measurable and sustained value from your RLDatix solutions. Once implementation is complete, your Customer Success Manager (CSM) will support a seamless transition into business as usual, providing structured, proactive engagement designed to embed the system deeply across your organisation.

Through regular success planning, ongoing performance and adoption monitoring, and a continuous programme of adoption-focused engagement, your CSM will help you optimise usage, track progress against agreed KPIs, and identify opportunities for enhancement. This ensures that value realisation continues long after go live, and that your organisation is supported by best practice guidance, tailored recommendations, and alignment with your operational cycles and strategic priorities. Your CSM will work with you to:

- Understand your workforce model, operational priorities, and goals
- Provide structured guidance for adoption in the short, medium, and long term
- Monitor performance and highlight areas of strong utilisation or opportunities for improvement
- Support rollout of new features, integrations, and workflow enhancements
- Create a shared Success Plan to keep everyone aligned and moving towards the same objectives

Your CSM's goal is to ensure you gain maximum value from your system and consistently achieve the outcomes that matter most to your organisation—whether that's improved staff experience, better governance, or enhanced workforce efficiency.

RLDatix Academy

Delivered digitally, our online RLDatix Academy provides ongoing, role-focused training and accreditation that supports effective system use and professional development. Working closely with Customer Success, the Academy ensures consistent guidance and best practice across all training materials. The Academy offers:

- 22 virtual classroom courses
- 14 eLearning modules
- Over 500 downloadable training documents (Feature Guides and Quick Reference Guides)
- More than 200 "How-To" videos with audio and captions

These resources give your teams the confidence and skills to use the system effectively, enhance their expertise, and support their own career progression.



Customer Support

Our Customer Support team ensures your systems remain reliable, stable, and effective—particularly in the fast-paced, operationally critical environments that healthcare organisations navigate every day. Operating in line with ITIL-accredited best practice, our proactive support model is built on transparency, technical expertise, and responsive service.

The Support team provides:

- Clear incident prioritisation and defined resolution targets
- Structured escalation paths and consistent communication
- Issue reporting through the Customer Support Portal or telephone
- Full visibility of updates and notifications through the Customer Support Portal

Beyond resolving issues, the team also proactively monitors trends, shares knowledge, and works closely with Customer Success and Account Management to identify and address potential problems before they affect service. This helps maintain system stability, optimise performance, and support compliance with organisational and regulatory requirements.

Resolution and Escalation

To ensure we build a successful relationship and maintain an enduring partnership with your team, we prioritise a proactive and transparent approach to resolution and escalation. Our comprehensive method guarantees that your concerns are addressed efficiently at every level of responsibility, fostering trust and continuous support throughout our partnership.

- **STRATEGIC LEVEL:** Our Account Manager will work with your team to deliver an ongoing collaborative relationship focused on maximising the benefits of our solutions, delivering your objectives, and escalating and resolving any challenges.
- **OPERATIONAL LEVEL:** Our Customer Success Team and Academy will ensure you gain maximum value and benefit from our implemented solutions and that you are achieving your desired outcomes.
- **TACTICAL LEVEL:** Our Customer Support service will promptly deal with your requests and are available 24/7, subject to incident priority level.

If at any time a customer feels that their support expectations have not been met, the customer may escalate their concern to their Account Manager and escalation will receive prompt attention and management focus.



5 Security & Privacy

RLDatix products are designed and implemented with a clear security architecture that includes a broad range of technical controls, ensuring a high standard of security management suitable for Healthcare employee data.

Cloud Security

Designed to survive complete data centre outages, our systems are locally hosted by the two biggest cloud-hosting providers in the world, Amazon Web Services and Microsoft Azure. Their robust and highly secure infrastructure, with several data centres in multiple locations, is engineered for redundancy, resilience, scalability, and continuity. Our cloud-based products are design to be available 365/7/24 and we monitor the hosting infrastructure 24/7. Our security measures include, but are not limited to:

- Infrastructure controls, covering both physical and electronic security (Role-based Access Control)
- Data encryption
- Regular data backups
- Vulnerability analysis and external penetration testing
- Frequent system security patching
- Secure-by-design approach to software development

Additionally, RLDatix's continuity of service provision is underpinned by the strict provisions of our own Business Continuity Plan, Disaster Recovery Plan, and Major Incidents Response Plan. We are accredited as compliant with **ISO 9001**, **ISO 27001**, and **Cyber Essentials Plus** and, as such, our plans and policies are tested and reviewed on an annual basis.

RLDatix has chosen its hosting providers with security in mind and all providers adhere to unique certifications specific to data centres. Their certifications are a combination of the following, depending on the provider:

- PCI DSS Level 1
- SOC 1 / ISAE 3402
- SOC 2 / SOC 3
- ISO 27001
- Compliant with Information Technology Infrastructure Library (ITIL) IT Service Management standards.



Data Privacy

RLDatix has implemented processes and procedures to comply with relevant legal and contractual obligations and support our customers legal, regulatory, and contractual obligations in the regions in which we operate. This includes the UK Data Protection Act, the UK Bribery Act, the UK Modern Slavery Act, the UK Network and Information Systems Regulations, the EU General Data Protection Regulation, and the EU Network and Information Security 2 (NIS2) Directive. RLDatix has:

- Implemented an information security program, independently assessed to meet ISO27001 standards.
- Appointed a CISO to manage the information security programme.
- A dedicated security team for continuous monitoring, incident response and forensic investigation.
- Implemented secure product development and quality assurance processes.
- An internal and external audit program to identify gaps in our program and look for improvements.
- Implemented a privacy program under which we have:
 - Appointed a Data Protection Officer
 - Implemented mandatory data protection and privacy training for employees at onboarding and annually, with additional sessions as needed. Training covers key security and privacy regulations such as GDPR and HIPAA, and is reinforced through quizzes and simulated phishing exercises. All materials are reviewed yearly to reflect evolving threats and regulatory changes.
 - Included privacy breach notification processes in our incident response runbook so we remain compliant with our legal and contractual obligations.
 - Put in place contracts with third party suppliers who process our data or that of our customers which meet the relevant legislative requirements.
 - Updated our standard customer contracts to meet the relevant legislative requirements.

These programs are embedded into our data to day operations and allow RLDatix to comply with the local laws and regulations governing data protection, privacy, and healthcare operations as they relate to our products and services. Operating under the name Allocate Software Limited, we are also registered with:

- **The Information Commissioner's Office** – Registration Number: Z7285503
- **The Data Security and Protection Toolkit** – ODS Code: 8HJ28

