

Allocate StaffDirect

Service Definition

G-Cloud 15

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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 StaffDirect

Effective agency management. Better workforce planning.

ALLOCATE STAFFDIRECT is a cloud-hosted, web-based Direct Engagement (DE) and temporary staffing solution that helps organisations fulfil short-term vacancies, reduce the cost of agency staffing, and improve governance and efficiency across the end-to-end booking process.

StaffDirect's key differentiator is that it is the **only** Direct Engagement solution fully integrated with our rostering solution, **ALLOCATE OPTIMA**, and bank management system, **ALLOCATE BANKSTAFF**. This integration enables organisations to operate a joined-up workforce workflow across demand and fulfilment, supporting consistent controls for bookings, rates, approvals and reporting, with a clear audit trail across activity and spend.

StaffDirect is comprised of two complementary capabilities:

1. **Allocate Direct Engagement** – Supports a Direct Engagement model that separates worker payments from agency fees, helping organisations reduce cost and increase control.
2. **Allocate Agency Manager** – Provides vendor management (VMS) functionality to streamline the procurement-to-pay cycle, strengthen governance, and improve visibility of agency performance.

Allocate Direct Engagement

Allocate Direct Engagement changes the way organisations engage with temporary staff by enabling a Direct Engagement model with greater control, improved transparency, and reduced administration.

Traditionally, organisations may rely on agencies to source workers and manage the commercial transaction end-to-end. With Direct Engagement, organisations can pay the worker directly and separately settle the agency fee. StaffDirect supports this approach through automated workflows, including self-billing functionality, so the worker payment and the agency fee are treated as separate transactions.

Allocate Agency Manager

Allocate Agency Manager provides vendor management system (VMS) functionality that streamlines and simplifies the procurement-to-pay cycle and supports strong governance.



It provides an intuitive portal from which the entire booking process can be managed and works seamlessly with Allocate Direct Engagement. This helps organisations strengthen compliance and risk mitigation, while improving visibility of booking activity and agency performance.

Weekly Payroll Service

StaffDirect can be complemented by an additional payroll service to support efficient weekly payment processing for temporary workers and associated agency charges.

This service helps organisations reduce administration and improve consistency when paying temporary workers, including those who work for short periods. It uses organisation-approved worker and timesheet information to support accurate weekly payments and the production of payroll and payment outputs.

Benefits include:

- **Process efficiency** through reduced manual administration and standardised weekly processing
- **Control over pay and commission rates** through clear governance and separation of charges
- **Reduced invoice errors** through consistent processing and structured outputs
- **Improved visibility** of costs and agency performance through supporting reporting and payroll files

Reporting Functionality

StaffDirect contains robust reporting functionality that provides transparency across temporary staffing activity and helps reduce administrative burden through automated reporting outputs.

Primary reports include:

- Savings Reports
- Master Data File reports
- Payment and payroll file reports
- NHSEI reports

The Savings Report provides an at-a-glance view of savings and costs, with the ability to filter by date range, staffing group, agency and cost centre to support granular spend analysis.



The Master Data File provides an export of raw transactional data from go-live onwards, supporting audit requirements and local analysis. This includes all shifts processed within the system and can be downloaded as needed.

In addition to standard outputs, bespoke reporting can be provided where required. Customer support services can also help organisations interpret trends and behaviours to identify opportunities for improvement (for example, where agency performance is impacting fulfilment or payment timelines).

Customer Representatives

Our StaffDirect Direct Engagement model is not just a 'software service', but a comprehensive support service too. All customers are kept in regular contact with a StaffDirect subject matter expert in Customer Success, who will help them to ensure that full savings potential is met, to explore further savings opportunities, and to help with managing their Agency Suppliers. Both on site and phone call meetings will take place, and the Customer Success Manager will maintain a close and cohesive relationship with you to ensure the best possible service at all times.

Key Benefits

- **End-to-End Integration** – Full integration with **ALLOCATE OPTIMA** and **ALLOCATE BANKSTAFF+** provides end-to-end-governance, real-time duty compliance, a complete audit trail and minimised data errors.
- **Simplified Process and Governance** – Set agency tiers, including auto-cascade and ensure adherence to rate caps, further controlling agency spend.
- **Automated Efficiency** – Single file uploads and automated timesheet approval notifications, plus the option to run payroll internally or via AllocatePay.
- **Agency Self-Bill** – Agency self-bill capabilities reduce administration time and errors, supporting efficient and more productive teams.
- **Transactional Cost Model** – A transactional model means all duties are set at a fixed rate and you only pay for the duties you process via direct engagement.
- **Dynamic Updates and Rules** – Automatically update agencies if duties are filled by substantive or bank staff and set organisational rate rules and exception processes.



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

