

Allocate JobPlan

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 JobPlan

Job planning. Simple, flexible and collaborative.

ALLOCATE JOBPLAN is a web-based job planning solution used by more than 85,000 clinical staff across over 140 NHS organisations, making it the most widely adopted job planning platform in the UK. It supports job planning for all clinical staff groups, including consultants, associate specialists, allied health professionals, pharmacists, and clinical nurse specialists.

The system includes an integrated demand and capacity module and offers seamless interoperability with our rostering solution, **ALLOCATE OPTIMA**, our data solution, **ALLOCATE DATAHUB**, and ESR. These capabilities enable higher quality job planning aligned to service demand, improved payroll consistency, accurate tracking of activity delivery, and robust business intelligence reporting.

Key Features

Standardised and Transparent Job Plan Process

JobPlan provides a consistent and transparent approach to job planning across the organisation. The system standardises the format of job plans and ensures that activities—whether measured in PAs, sessions, or hours—are calculated consistently for each staff group.

With up to three configurable levels of electronic sign off, tailored at organisational, specialty, or individual level, JobPlan embeds robust governance and reinforces accountability throughout the process. The platform supports a 'hub and spoke' operating model, enabling a central Project Manager to oversee progress while Clinical and Service Managers lead job plan development within their own departments.

Organisational settings allow teams to determine the balance between centrally managed and department led activity, providing flexibility without compromising consistency. Clinical activity terminology is fully customisable at department level, within a structured framework of categories and benchmark headings. Clinical and non-clinical activities can also be restricted to specific staff groups where required.

Pre-populated travel times between hospital and clinic sites introduce further standardisation and ensure that activity start times are realistic. The process is supported by configurable milestones and automated alerts, helping organisations maintain momentum and complete job planning cycles in a timely and efficient manner.



Flexible and Comprehensive

JobPlan recognises that modern clinical services require a high degree of flexibility. The system supports multiple approaches to building a job plan, enabling organisations to create fixed timetabled activity, annualised activity by day, or fully flexible activity patterns—ensuring the needs of individual clinicians and services are met.

The platform also supports the use of hot activity, allowing prospectively calculated hot activity to overlay routine activity on a separate cycle. JobPlan automatically calculates the impact of hot activity on any routine activity it overlaps, ensuring accuracy and reducing administrative burden. Consistency is further supported through configurable on call rota templates, with the option to include multiple rotas within a single job plan where required.

All calculations are aligned with national contracts and staff group requirements, providing assurance that job plans are calculated fairly, transparently, and in accordance with agreed standards—regardless of the planning approach used.

Demand-Led Service Job Planning

JobPlan places demand at the centre of the job planning process, helping organisations create more accurate, efficient plans that support engaged clinical teams and improved patient outcomes. The built in demand and capacity modelling tools enable service and clinical managers to define future service requirements by recording commissioned and non-commissioned activity, alongside expected patient outputs.

These models can be overlaid to create a team level plan, allowing activities to be distributed across the workforce and highlighting areas of over or under capacity from the outset. Team plans can then be shared with individual clinicians and their managers during job plan development, ensuring transparency, alignment, and a shared understanding of service needs throughout the process.

ESR Interface

The ESR interface enables job plan data to be automatically transferred into ESR at the point of job plan sign off. This significantly reduces administrative workload and ensures organisations meet national requirements for aligning job plans with payroll. By automating this process, JobPlan supports accuracy, consistency, and compliance across workforce and payroll systems.



Objective Linked

Aligning delivery of activity to the overall objectives of the organisation is seen as increasingly important. JobPlan's three-tier approach of Organisation, Service, and Personal Objective setting allows clinical staff to link their activities with specific objectives, including those at an organisation-wide level. In doing this, Managers can ensure that organisation-wide objectives are not simply being lost amongst staff but are actually being implemented and carried out at a granular, individual activity-based level.

Powerful Reporting

JobPlan enables organisations to monitor job planning progress in real time and to analyse activity data at any level. Comprehensive activity and on call reporting makes it easy to understand the volume and type of activity being committed to, providing essential insight for accurate demand and capacity modelling. This ensures organisations can realistically assess what can be delivered within their existing resourcing envelope.

Reports can be filtered by staff group and extracted in PAs, sessions, or hours, depending on requirements. Integration with our data platform, **ALLOCATE DATAHUB**, further enhances reporting capability, enabling complex, bespoke business intelligence outputs tailored to organisational needs.

Fully Integrated with Operational Rostering

JobPlan allows organisations to turn plans into operational reality through a dedicated interface between JobPlan and our rostering solution, **ALLOCATE OPTIMA**. This interface ensures that rosters and clinical schedules are aligned, supporting sensible planning and delivery cycles. Timetabled job plan activities automatically generate Personal or Demand Patterns, which underpin the roster—saving time, improving accuracy, and ensuring that planned activity flows directly into scheduling.

When used alongside our **ALLOCATE ACTIVITYMANAGER** module within **ALLOCATE OPTIMA**, this integration enables organisations to cross reference contracted activity against delivered activity, helping maintain productivity and service continuity even in unpredictable environments. This supports national requirements to monitor the delivery of planned activity. Both systems can be integrated with **ALLOCATE DATAHUB** to create advanced, bespoke BI level reports and dashboards.



Expert Support and Training

All system users have access to the built in AI Helper, providing 24/7 support for system queries and navigation. This continuous, on demand assistance is particularly valuable given the annual nature of job planning and helps drive confident adoption across all user groups.

RLDatix provides expert support through multiple specialist teams. Our Services team ensures successful implementation, while our Specialist team supports ongoing adoption and best practice use post implementation. Each organisation is also assigned a dedicated Customer Success Manager to review adoption, usage, and benefit realisation. Day to day queries are handled by our Service Desk, and all users have access to the Datix Academy for comprehensive, on demand training resources.

Key Benefits

JobPlan provides organisations with several key benefits, including, but not limited to:

- Establishes a clear, standardised job planning process across the organisation.
- Integrated Demand and Capacity module ensures job plans align with actual service demand.
- Streamlined tracking of job plan progress, including multi level review and sign off.
- Promotes transparency and fairness in how activities are valued and remunerated.
- Fully customisable notification templates.
- Ensures consistency in job plan format and activity language.
- Flexible activity entry options to accurately capture complex working patterns.
- Aligns organisational, service, and individual objectives directly to job plan activities.
- Simplifies consolidation of job plans with comprehensive reporting and analytics.
- Integrates with Optima, ESR, and DataHub to support seamless workforce and payroll alignment.
- Provides shared sign on with Assure Appraisal for a unified user experience.
- Includes an AI Helper to guide and support users throughout the process.
- Offers dedicated support and networking opportunities for job planning leads and administrators.



Allocate JobPlan's Alignment with National Job Planning Expectations

In recent years, national recommendations have established a clear blueprint for what successful and effective job planning should entail. We work closely with governing bodies to ensure JobPlan fully supports the delivery of these requirements, as outlined in the table below:

Requirement	How Allocate JobPlan Supports Delivery
Universal Inclusion of Clinical Staff	JobPlan supports all clinical staff groups (Consultants, SAS, AHPs, pharmacists, CNS, etc.) with configurable staff categories and activity restrictions.
Standardised Job Plan Format & Terminology	JobPlan allows standardised templates, fixed PA/session/hour calculations, and customisable activity language with organisational governance controls.
Transparent Governance & Multi-Level Sign-Off	Up to three configurable levels of electronic sign-off, tailored by organisation, specialty, or individual, ensuring robust governance and accountability.
Demand-Led Job Planning	Built-in demand & capacity modelling, team plans, and activity distribution tools ensure job plans reflect real service need.
Team-Based Job Planning	Team plans overlay individual plans, highlight over/under-capacity, and can be shared with clinicians for alignment.
Alignment to Organisational Objectives	JobPlan's three-tier objective framework links activities directly to organisational priorities.
Accurate Calculation Aligned to National Contracts	JobPlan automatically calculates PAs/sessions/hours in line with national contracts, including hot activity and on-call templates.
Capture of All Activity Types	Flexible activity entry options allow detailed capture of all activity types, including complex working patterns.



Requirement	How Allocate JobPlan Supports Delivery
Integration with Workforce Systems	JobPlan integrates with Optima, ESR, and DataHub to align job plans with rosters, payroll, and workforce data.
Payroll Alignment	ESR interface automatically transfers job plan data into ESR at sign-off, reducing admin burden and ensuring payroll alignment.
Monitoring Delivery of Planned Activity	Integration with Optima Activity Manager enables cross-referencing of contracted vs delivered activity, supporting national monitoring requirements.
Real-Time Reporting & BI Insight	JobPlan provides real-time dashboards, filters by staff group, and DataHub integration for advanced BI reporting.
Fairness, Transparency & Clinician Engagement	JobPlan's structured workflow, clear calculations, and shared team plans promote fairness and clinician involvement.
Realistic Scheduling & Travel Time	Pre-populated travel times and standardised activity definitions ensure realistic, consistent planning.
Support, Training & Capability Building	AI Helper, Academy, Service Desk, Specialist Team, and dedicated CSM support implementation, adoption, and continuous improvement.



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

