

Allocate Optima

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 The Allocate Optima Package

Our flagship rostering, bank, and acuity solutions combined to create a single holistic system for healthcare organisations.

The cloud-hosted Allocate Optima package **combines our flagship rostering, bank, and acuity solutions** to create a single holistic system for healthcare organisations. The package is comprised of:

- Allocate Optima
- Allocate BankStaff
- Allocate SafeCare
- Allocate RosterPerform11
- Allocate DataHub
- Allocate Loop
- Additional employee access systems
- Our Customer Success Service

Allocate Optima

ALLOCATE OPTIMA is the most commonly used e-rostering system in the UK&I and is designed not only to automate the rostering process, but to make rosters safer for both patients and staff alike. Through a variety of features such as roster analysers, demand template functionality, integration with ESR and more, Optima provides organisations and their staff with **unparalleled visibility and control** of the rostering process. The application is designed to ensure that the full benefits of e-rostering are realised, and that follow-on processes – including temporary staffing management and HR/payroll processing activities – are also significantly improved.

Optima's exceptionally powerful tools are delivered via a deceptively simple '**one-screen, one-click**' **user interface** that allows users to interact easily and then move on to other tasks in rapid succession. Optima is the foundation of the RLDatix workforce suite and provides **seamless integration** to companion products and modules such as Loop.

ALLOCATE LOOP, Optima's companion app, provides staff with a quick and simple portal with which to manage their working lives, enabling them to view rosters, make duty, leave, and study requests, view and manage bank bookings, and check their timesheets. In addition to this, the Loop app also allows staff to view their rosters anytime and anywhere, therefore providing staff with clear visibility of their work duties at all times.



Key Features

Fully Integrated with NHSP and BankStaff

Rostering does not stop with substantive staff, and neither does Optima. The system helps to ensure that shifts are filled by appropriately skilled staff at all times – whether substantive, bank, or agency – by linking fully and directly with NHSP and Allocate BankStaff. Managers benefit from making bank requests directly from the roster and from seeing bank and agency assignments as part of the roster, while bank office staff receive requests that are timelier and can easily check against substantive duties for WTD compliance.

Connected Rostering for Multi-Disciplinary Teams

Unique to Optima, the system provides workforce management tooling and rostering for all staffing groups with a consolidated view that helps multi-disciplinary teams work together and more efficiently. For instance, when a Consultant cancels a clinic, Optima ensures that the impact on AHPs, Nurses, and other essential staff resourcing is managed effectively.

Interoperability

Optima is equipped with integration of several HR and Payroll systems including bi-directional integration, this streamlines burdensome administrative processes and improves the accuracy of Pay and HR data. Allocate first delivered a live ESR interface in April 2007 and, since then, have been constantly improving these interfaces ever since. Optima's integration is comprised of three key components:

- **Gateway for Staff Records** – Staff and assignment data will be automatically loaded into Optima from the HR system using interface technology. The gateway can also cater for uploads, files, and interfaces for person record management for a range of HR providers.
- **Optima Time and Attendance (Pay) Data to ESR and Other HR/Pay Systems** – Pay data for substantive and bank staff can be sent as appropriate. Optima will automatically calculate the earned pay hours from rosters using Agenda for Change and other rules, therefore ensuring correct pay.
- **Optima Absence Data to ESR and HR Systems** – Sickness, leave, and other absence data can be provided, including primary and secondary sickness reasons, 'return to work' information, and more.

Support for Flexible Working

Flexibility is a key component of staff retention and is aided by Optima's robust functionality that supports staff flexibility in terms of working hours, patterns, and self-service scheduling.



Multi-Location Rostering

In addition to managing when clinical staff members are working, Optima takes this a step further and manages where staff are working too. This functionality is key for complex rostering areas such as theatres, clinics, and midwifery and community staff, where visibility of locations or resource pools are crucial to making strong workforce decisions and delivering the best possible care.

Key Benefits

- **Automated Roster Creation and Simple Maintenance** – Both in regular wards and highly complex areas such as theatres, A&E and Maternity.
- **Real-Time Rules Engine** – Highlights unsafe or unfair working as soon as a duty is assigned, even highlighting rules around absence such as limiting workers from working bank shifts if they have recently been off sick, rules are customisable to each organisation's unique requirements.
- **Bank and Agency Integration** – Integrates with BankStaff or NHSP to ensure that all vacant duties are filled in the most efficient and safest way.
- **Automated Timesheets** – Auto-generation of enhanced hour payments using Agenda for Change, replacing a day-long manual process with the click of a button.
- **Payroll Integration** – Sends pay and absence data using well established HR interfaces, reducing the administration burden, and increasing accuracy.
- **Roster Analysis** – Objectively shows if the roster is 'good' - i.e., safe, fair, and efficient – via Key Performance Indicators (KPIs).
- **Improved Patient Care** – By ensuring that correctly skilled staff are on duty and increasing time to care.
- **Reduced Costs** – Highlights and reduces avoidable costs by better utilisation of the workforce.
- **Increased Operational Intelligence** – An unrivalled transparency of staffing issues helps to fix problems before they impact services.
- **Reduced Back Office Costs** – Streamline operations by automating payroll, absence, and admin processes.
- **Reduced Dependency on Bank and Agency Staff** – Delivering cost savings and improved continuity of care.
- **Reduction in Absenteeism and Lateness** – Increase roster satisfaction with a fair and transparent process and reduce fatigue due to poor rostering.
- **Improved Payroll Accuracy** – By automating enhanced pay and directly interfacing to ESR.



Allocate BankStaff

ALLOCATE BANKSTAFF helps to optimise and **efficiently manage the temporary workforce**, ensuring compliant and safe staffing, reducing the reliance on expensive external agencies, and enables flexible bank working with improved engagement for the bank workers. BankStaff is uniquely and closely integrated into **ALLOCATE OPTIMA** but can operate standalone. BankStaff also has a suite of reports for analytics.

Built on a proven and established platform, BankStaff has been designed to improve and streamline the process of identifying and deploying staff to fill available bank shifts. By seamlessly and closely **integrating with the roster** through an evolved and proven technology, the application not only significantly simplifies a complex process, but also ensures that rules breakages do not occur, enabling the bank office to concentrate on filling the harder-to-fill/more expensive shifts.

At the same time, workers feel empowered and in control of their flexible work-life through their individual worker app which enables them view bank shifts suitable for them, add availability, book and manage their bank duties, view schedules, and add timesheets any time anywhere.

Guided by the principle of **using agency staff only as a last resort**, BankStaff also manages the agency relationship and ensures that the best value for money is secured. Consistent with the 'self-service' principle of BankStaff for all stakeholders, agencies have access to an agency portal to further reduce administration and to streamline processes, whilst ensuring compliance with the organisation's process.

Staff data can be uploaded and maintained from HR systems and pay files are generated that can automatically be loaded into payroll systems such as ESR.

For customers looking to add additional value, the features of BankStaff can be easily extended with **ALLOCATE BANKSTAFF+**. Customers can also save on agency spend through integration with our direct engagement solution, **ALLOCATE STAFFDIRECT**, and can form collaborative banks via our **ALLOCATE CLOUDSTAFF** solution.

Key Features

- Ability to request duties, and view booked bank/agency workers directly from the roster.
 - Information flows two ways, so updates from the Bank automatically update the rosters.
- Manage Bank workers, including professional registration, training/certification, work preferences, annual leave, and upload from ESR.



- Workers can enter their bank availability, book shifts, view schedules, cancel bookings and enter timesheets via an app or web portal.
- Sends alerts via SMS and Email to broadcast available duties, confirm bookings and cancellations, remind of duties, and send ad-hoc communications.
- Timesheet, approval, and payment processes with pay extract to ESR.
- Provides comprehensive audit trails of bank and agency usage.
- Financial modelling gives managers estimated duty costs and agency costs before transferring requests.
- Manages and improves control of agencies, including onboarding, charge rates, duty cascade (including auto cascade) bookings, and invoice reconciliation. Includes an agency portal.
- Configure system roles and access, to tailor access to organisational needs.
- Reports and data extracts for management information/analytics, including NHSI bank & agency reporting.
- Can easily be extended with **ALLOCATE BANKSTAFF+** features, integration into **ALLOCATE STAFFDIRECT** for direct engagement, and to form collaborative banks via **ALLOCATE CLOUDSTAFF**.

Key Benefits

- Reduced clinical risk by providing the right staff with the right skills.
- Self-Serve and automation enable streamlining of the bank booking process, empowers, and devolves responsibility, and saves time.
- Enhance your organisation-wide staffing visibility for all staff groups, with one accurate view for complete clinical governance.
- Integration into rosters ensures only genuine, budgeted, and authorised demand is requested to bank, resulting in staff resource savings and fewer clerical errors
- Faster worker communication through targeted SMS and email notifications.
- Cost savings through improved bank fill and reduced agency use.
- Improve control and compliance via rule configuration, including compliance with EWTD requirements.
- Control agency spend through Direct Engagement Integration, negotiated rates, and invoicing.
- Delivers real-time operational data for informed decisions and reviews.



Allocate SafeCare

ALLOCATE SAFE CARE allows organisations to **compare current staffing levels and skill mix to real-time patient demand**. It provides visibility across wards and areas transforming rostering into an acuity-based daily staffing process that unlocks productivity and safeguards patient safety. SafeCare provides an instant view of whether staffing levels are safe enough for clinical demand **applying the appropriate calculations** for a unit and decision support for redeployment.

SafeCare also allows nurse directors, matrons, and site managers to see a site-wide view of staffing levels, as well as unit-specific views. Fully informed, this information allows Managers to make changes in real-time, redeploying staff where appropriate, and updating the staffing and staffing level information right at that moment.

Utilised by over 200 NHS and Independent health and care organisations, SafeCare empowers clinicians, site managers, matrons, ward managers, nurses, AHPs and Medics. It is accessible on desktop computers and tablets, allowing clinical and operational teams to quickly.

Key capabilities include:

- Record a census of patient numbers, acuity, and dependency – typically two or three times a day.
- See the staffing status of all wards, services, and locations in a single view.
- View staffing status across many dimensions including hours short/excess, missing skills, missing charge cover, and skill mix.
- See all staff rostered on a shift, including their skills.
- Track attendance and sickness of those staff.
- Redeploy staff safely, therefore helping to avoid unnecessary agency use.
- Request bank or agency cover if needed.
- Quickly track 'Red Flags' as they occur as required by the first safe staffing NICE guideline.
- Record professional judgements.

SafeCare also allows organisations to define a unit's acuity model which can be set to meet local requirements.



Allocate RosterPerform11

E-rostering makes enormous amounts of data available that was previously unobtainable. The challenge, however, is in how this data can be digested and presented in a way that delivers real operational improvement. **ALLOCATE ROSTERPERFORM11** is the tool designed to give managers the ability to use this data to measure and benchmark how well staff are functioning across the organisation, in real-time. As a web-based management dashboard, RosterPerform11 clearly highlights staffing issues both now and into the future.

Key Features

RosterPerform11 monitors Key Performance Indicators in five areas, displaying previously unobtainable data:

- **Safety:** Shows if the actual staffing level is aligned with clinical demand, including unfilled shifts that should be covered, skills gaps, and instances in which there is a lack of senior staff in charge.
- **Unavailability:** Monitors sickness, annual leave, study, and other absences so that the peaks and troughs of unavailability can be avoided, and dependence on temporary staff reduced.
- **Effectiveness:** Shows where staff are not being utilised effectively which, when resolved, reduces costs and improves cover.
- **Fairness:** Requests and broken award rules are analysed objectively, ensuring staff are treated fairly.
- **Establishment:** Highlights establishment issues, including misalignment of budgets with demand, staff vacancies and staff inflexibility.

RosterPerform11 unlocks all this information, enabling managers to identify issues and respond accordingly. Information provided by **ALLOCATE OPTIMA** becomes integral to operational running of healthcare bodies.

Key Benefits

- Provides Managers with a view of the whole workforce across an entire organisation
- Provide data in a ready to use format anytime, anywhere
- Enables Managers to use substantive staff more efficiently and reduce temporary staff usage
- Minimises operational risk by ensuring services are safely staffed
- Provides Managers with evidence that services are being run as effectively as possible
- Provides all data in one secure source



Allocate DataHub

Though the Optima suite offers a number of different ways to view and aggregate data, organisations often benefit from being able to perform their own independent analysis, combining the data from Optima products with data from other organisational data sources, or developing metrics and visualisations that address unique organisational KPIs and challenges. **ALLOCATE DATAHUB** provides a secure, automated interface for an organisational data team to access data from **ALLOCATE OPTIMA** and **ALLOCATE SAFE CARE** and transfer it into the organisation's data warehouse.

Key Features

DataHub provides all valuable Optima and SafeCare data, collated in two different ways:

- Managed views are collections of data curated by RLDatix which allow data teams to get started quickly with the most commonly used Optima datasets without needing to understand the full data schema.
 - Hours Assignment
 - Unavailability
 - Timesheet Entry Breakdown
 - Bank & Agency Fulfilment
 - Unfilled Duties
 - Hours Assignment Pay Flags
 - Warnings And Violations
 - Roster Demand
- Advanced views provide a complete set of normalised data for more experienced data teams to analyse.

Key Benefits

- Provides a single, secure daily source containing all valuable Optima and SafeCare data.
- Supports automation to remove the need for manual extraction and consolidation of data.
- Supports native integration with common BI tools, for straightforward implementation.
- Permits data teams to incorporate data from Optima and SafeCare into their existing organisational dashboards and reports.



Allocate Loop

Allocate Loop is the ultimate workforce management platform, uniting all workers – regardless of staffing group or specialty – on a single, seamless system. With advanced functionalities such as: intelligent rostering, streamlined timesheet management, real-time communication, and effortless shift fulfilment, Loop empowers organisations to operate with maximum efficiency. 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.

Supported by Loop's two-way communication feature, engaging people across your organisation becomes simple and safe, and enables colleagues and teams to connect with each other, stay up to date on latest news, and feel part of the community.

Key Features

- **Instant Group Creation** – Teammates automatically get added to a group when the roster is published, ensuring all staff receive essential comms about the area or team.
- **Interest-Based Groups** – Staff can create and follow specialist interest pages, supporting engagement across teams.
- **Secure Colleague Messaging** – Colleagues can be added as connections and message each other without exchanging personal information, creating a safe environment to connect.
- **A Connected Workforce** – All workforce groups can be connected, even temporary, remote and occasional workers, via both the web and app.
- **Integrated Workflows and Insights** – Reduce admin with integrated workflows with management tools. Target push notifications, so staff are only sent the information and updates relevant to them.
- **Pre-Rotation Connections** – Resident doctors can link up with teammates before starting their rotation, creating a supportive community from the get-go.
- **A Safe Space** – Only members of your organisation may join, contact details remain private, concerns can be reported anonymously, and the platform is moderated by the organisation's admin team.
- **Faster Staffing** – Shifts are broadcasted to internal and collaborative banks, and bookable in a few taps.



Key Benefits

- **Reduced Administrative Burden** – Less administrative work for the workforce management team by empowering your employees and letting them take control of their work-life admin.
- **Enhanced Control** – Full administrative control to add and remove staff, manage access, and manage content throughout the communications module, therefore retaining control over employee behaviour within the app.
- **Stronger Communication** – Encourage better intra-organisation communications between teams and staff, creating a sense of community and belonging, with multiple in-app avenues available to converse with colleagues.
- **Stronger Relationships with Staff** – Improve retention and create a more open culture, helping you to become an employer of choice and grow your future workforce.
- **Efficient Bank Management** – Loop provides a simple and accessible way to manage all temporary staffing bookings, from marking availability to adding timesheets after duties have been worked.
- **Unified View of Rostering** – Loop is fully integrated with our rostering solution, Allocate Optima, providing staff with complete control as they are able to book bank duties directly, self-schedule shifts, and manage annual leave or study time.



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

