



Business Continuity Plan

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This business continuity plan outlines how Case Management Hub plans on keeping its business operational if there's an unplanned or severe disruption to our usual services.

The business continuity plan includes data recovery and backup procedures, strategies for resuming office productivity, and communication guidelines.

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1. BUSINESS FUNCTION RECOVERY PRIORITIES

Case Management Hub is a multitenant, self-service, cloud-based platform that runs in a fully redundant (live/live) configuration across multiple datacenters in multiple regions in North America (Canada and the United States).

Case Management Hub's staff members reside and work in different regions, including the United States, Europe, and South Asia. This enables continuity of operations, in the event there is a shutdown in any region.

Case Management Hub takes secure daily backups of its data. In the event of any significant disruption or infrastructure outages to its data centers and infrastructure, Case Management Hub will work with our cloud vendor ([Akamai](#) (formerly known as Linode, LLC)) to restore data using the last backup, and ensure that services are swiftly restored and continue to operate. Restoring data can take as little as 1 hour to 48 hours depending on overall data size, backup operations, and the nature of the disaster.

As part of using our services, customers have the ability to easily take backups of their records at any point and can leverage these backups in the event of a disaster affecting Case Management Hub services. When our system is running, there is no limit to how often a customer can take a backup of their records in our system.

2. RECOVERY & COMMUNICATIONS PLAN

In the event of a disaster that interrupts Case Management Hub services, Case Management Hub will directly notify its users and customers via an email broadcast and will activate its disaster recovery phases.

Customers and users will be kept updated with regular updates until normal services have been restored.

Case Management Hub uses a separate platform (provided by Google Workspace Business) for its email and communication services to ensure communications to customers and users is unaffected in the event of a disaster affecting our services.

If all online platforms, including Google Workspace is experiencing a global-wide disaster event, and Case Management Hub is not able to email its customers and users, we will implement a plan to contact our customers and users directly via phone using their phone number on file.

3. RECOVERY PHASES

A. DISASTER OCCURRENCE

In the event of a disaster that affects our services, Case Management Hub will declare a disaster event, and make the decision to activate the rest of the recovery plan.

B. PLAN ACTIVATION

During this phase, this Business Continuity Plan will go into effect. This phase continues until the company can continue to provide uninterrupted services.

4. RECORDS BACKUP

Case Management Hub takes secure daily backups of its data. In the event of any significant disruption or infrastructure outages to its data centers and infrastructure, Case Management Hub will work with our cloud vendor ([Akamai](#) (formerly known as Linode, LLC)) to restore data using the last backup, and ensure that services are swiftly restored and continue to operate.

Restoring data can take as little as 1 hour to 48 hours depending on overall data size, backup operations, and the nature of the disaster.

5. RESTORATION PLAN

The restoration plan addresses any service disruptions or disasters that would affect all records vital to the continuation of business operations.

Case Management Hub maintains, controls, and periodically checks on all of the records that are vital to the continuation of our business operations, which would be affected by any cloud operation disruptions or disasters. Case Management Hub periodically backs up and securely stores these records in the event of a disaster and interruption to our services.

In addition to the operational processes described above, Case Management Hub also conducts business continuity plan exercises at least once annually where engineering and operations team members test a real disaster scenario.

This provides additional training and experience for our personnel on our BCP plan for the enterprise as a whole in addition to the service itself. On average, restoring data to its backed-up state generally takes an average of 1 hour – 48 hours of downtime. In the event of a disaster to our services and infrastructure, we can expect to be back up and available to customers within 48 hours.

6. RECOVERY TEAMS

The company establishes recovery teams and divides the participants into appropriate groups based on job role and title.

A. TEAM ROLES

Case Management Hub has identified the following roles as part of its business continuity plan:

- Team Leader
- Backup Team Leader

B. TEAM CONTACTS

Please see internal contact list.

C. TEAM RESPONSIBILITIES

Case Management Hub has designated the following responsibilities:

- Business Continuity Coordinator Incident Commander
- Information Technology Recovery Team
- Client Relationships
- Sales and Marketing
- Legal/Contacts

7. RECOVERY PROCEDURES

Specific activities and tasks to perform in order to recover normal and critical business operations.

1. Disaster Occurrence

- This phase begins with the occurrence of the disaster event and continues until a decision is made to activate the recovery plans.
- The major activities that take place in this phase includes:
 - emergency response measures,
 - notification of management,
 - damage assessment activities,
 - and declaration of the disaster.

2. Case Management Hub Internal Notifications

- Team leader informs the members of the senior management team if they have not been informed.
- Personnel are notified of the disaster. Depending upon the time of the disaster, personnel are instructed on what to do.

3. Preliminary Damage Assessment

- After a disaster occurs, Case Management Hub will quickly assess the situation to determine whether services can immediately be restored, the potential extent of damage, and the potential for additional danger.

4. Declaration of Disaster

- Actual declaration of a disaster is to be made after consulting with senior management.
- All teams should wait for notification from the senior management team that a disaster has been declared and that groups/departments are to start executing their Business Continuity Plans.

5. Plan Activation

- In this phase, the Business Continuity Plans are put into effect. This phase continues until critical business functions are reestablished and cloud system services are restored.
- Customers and users are notified via email (and/or via phone) detailing the events of the disaster as well as the proposed restoration plans and/or the progress and estimated timeframe for the complete restoration.
- Customers and users are kept updated with regular updates until normal services have been restored
- The major activities in this phase include notification and assembly of the recovery teams, implementation of interim procedures, and re-establishment of data communications.

6. Implementation of Temporary Procedure

- Obtain any files that are missing. Develop prioritized work activities, especially if all staff members are not available.

7. Restoration of Data Process and Backup

- Determine when the data center is to be recovered, if affected by the disaster.
- Also, discuss when data communications will be established between the primary or secondary backup data centers.

8. Management of Work

- Determine priorities for work backlogs to ensure the most important backlogged tasks are resolved first.
- Set an overtime schedule, if required, based on staff and system availability.
- Set backlog priorities, establish backlog status reports if necessary, and communicate this to the Client Relationships supervisor. Report the backlog status to management on a regular basis.
- If backlogs appear to be very large or will take a significant time to recover, determine if temporaries could be used for certain tasks to help eliminate the backlogs. If justified, arrange for temporaries to come in.

9. Transition Back to Primary Operations

- This phase consists of all activities necessary for Case Management Hub to go back to doing business as usual.