

Quarterly Planning Thread

Vortex Grid Mail Export

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From:	Riley Okafor, Program Delivery <riley.okafor@vortexgrid.example>
To:	Meridian Record Exchange Steering Group <mee-steering@vortexgrid.example>
Cc:	Celeste Wong; Noor Patel; Morgan Iqbal; Avery Lin; A. Lin, Product Finance
Date:	Thu, 25 Jun 2026 16:00:00 +0000
Subject:	Q3 plan - MEE-26 workstream composition and open decisions

Hi steering group,

The Q3 plan for MEE-26 is attached for review. The project uses the display name Meridian Record Exchange as of 2026-06-15; earlier documents may use Meridian Evidence Exchange. MEE-26 remains the project reference. The plan contains four active workstreams: Incident Chronicle, Regional Change Windows, Supplier Identity and Reconciliation, and Customer Narrative Discipline. Each workstream has a separate owner and its own done/not-done line. One pilot template is in use; that doesn't make the whole project done (however much nicer that would make my slide).

The incident workstream will incorporate the approved correction/retraction structure from IR-2026-017. The regional workstream will pilot explicit UTC, local timezone, recovery interval, rollback threshold, and handoff recipient fields. Supplier Identity will incorporate the legal-name and vendor-ID controls in VRM-2026-09. Customer Narrative will review preliminary-status labels and approval paths. They connect, but please review your own workstream section rather than treating the four-line summary as the whole plan.

Please review budgets, staffing, and open decisions by 2026-06-30 at 17:00 UTC. Avery Lin is the Service Readiness analyst supporting record coordination. A. Lin in Product Finance supports financial analysis. Their abbreviated names are not interchangeable;

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please use the directory identity shown in the recipient list for assignments and approvals.

Riley

Riley - attachment correction, 16:09 UTC

The first attachment had Noor as owner of Customer Narrative (sorry, Noor). Marta owns that one; Noor owns Supplier Identity and Reconciliation. Replaced with Q3-plan-v4. The July 17 checkpoint is still a future meeting, not a completed milestone. If you downloaded v3 in the first nine minutes, please bin it.

From: Noor Patel, Finance Controls <noor.patel@vortexgrid.example>
To: Riley Okafor; Meridian Record Exchange Steering Group
Cc: Celeste Wong; Morgan Iqbal; Avery Lin; A. Lin, Product Finance
Date: Thu, 25 Jun 2026 10:41:00 -0700
Subject: Re: Q3 plan - MEE-26 workstream composition and open decisions

Finance supports the supplier workstream, but the label needs fixing. VRM-2026-09 split two suppliers with similar short names; it didn't find bad parts, approve a payment change, or solve North Harbor. Please call the Q3 item "supplier identity control," not "supplier remediation." That second phrase will create a meeting I don't want.

A. Lin in Product Finance will provide cost and reconciliation data. Avery Lin can help with the document list but isn't the finance approver. Please kill the "Lin review" row in v4 and use their full names. They are different people, not a clever abbreviation.

Noor

A. Lin - 11:02 PDT

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Thanks, Noor. Cost sheet will be by supplier legal name and vendor ID, with USD and GBP kept separate. Avery and I compared calendars so we don't both arrive as "A. Lin" again. For avoidance of another heroic spreadsheet: I own the Q3 cost composition; Avery owns the document index.

From: Morgan Iqbal, Service Assurance <morgan.iqbal@vortexgrid.example>
To: Riley Okafor; Meridian Record Exchange Steering Group
Cc: Celeste Wong; Noor Patel; Avery Lin; A. Lin, Product Finance
Date: Fri, 26 Jun 2026 14:20:00 +0000
Subject: Re: Q3 plan - MEE-26 workstream composition and open decisions

Service Assurance supports Incident Chronicle. IR-2026-017 is a useful worked example: timeline, preliminary status, correction, final review. Please don't write that it is the model for all gateway failures. The pilot tests whether the record flow works; it isn't another technical experiment on the incident.

For cross-region scheduling, any July pilot meeting must include a controlling UTC time and a stated local timezone. If a recurring invitation is cancelled or moved, the calendar record must show that change. An email can explain a move, but the organizer still has to update the invite. This is a process check, not a mark against whoever happens to be holding the calendar.

Morgan

From: Riley Okafor, Program Delivery <riley.okafor@vortexgrid.example>
To: Meridian Record Exchange Steering Group
Cc: Celeste Wong; Noor Patel; Morgan Iqbal; Avery Lin; A. Lin, Product Finance
Date: Tue, 30 Jun 2026 17:18:00 +0000
Subject: Q3 plan approved - MEE-26 workstream composition

Approved, with the edits in v4 and Morgan's calendar note. Four workstreams, four named

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owners, and open items stay open. The July 17 pilot checkpoint is at 15:00 UTC; calendar invite will have attendee responses and local times.

Thanks all. Dana asked whether the project is green now. I said "green-ish in places," which I realize is not a governance status. The actual workstream table remains amber.

Riley

From: Riley Okafor, Program Delivery <riley.okafor@vortexgrid.example>
To: Meridian Record Exchange Steering Group
Cc: Celeste Wong; Noor Patel; Morgan Iqbal; Hana Vogel, Metering Data Services
Date: Tue, 14 Jul 2026 16:05:00 +0000
Subject: Second team using the chronology template - MEE-26

One addition to the Q3 picture, and a boundary with it.

Metering Data Services has been running IR-2026-023 on our chronology template since 6 July. That is a Calder Mills metering export question with its own owner, its own change record, and its own supplier review. It is not connected to IR-2026-017 and does not belong in the Incident Chronicle case material as a second North Harbor data point.

What it does give us is one honest piece of evidence for the workstream: a team outside the design review picked the template up and used the observation and assessment labels without being trained on them. Hana, if you have five minutes at the checkpoint I would rather you described what was awkward than what worked. The compliment is not useful to me; the friction is.

To be explicit, because someone will ask: this does not close the Incident Chronicle workstream. One incident and one pilot are two occurrences, not a control that has been demonstrated at scale, and the metering review is still open.

Riley