

Program Review Notes

Vortex Grid Systems Inc.

Program Review Notes - Meridian Record Exchange Q3 Readiness

Record ID: NOTE-004
Review reference: MEE-26-PR-02
Date: 2026-06-30
Time: 15:00-16:20 UTC
Author: Riley Okafor, Program Delivery
Participants: Dana Ortiz; Morgan Iqbal; Noor Patel; Celeste Wong; Avery Lin; A. Lin, Product Finance
Notes by: Riley Okafor
Revision: 1.1, corrected 2026-07-01

Riley's notes; not polished minutes. Corrected the two Lin assignments on 7/1.

Name / reason for review

Q3 readiness review for MEE-26. The project uses the display name Meridian Record Exchange after 2026-06-15. Earlier sources use Meridian Evidence Exchange. The display-name change did not create a second project or change the charter, sponsor, budget, or old documents. We kept MEE-26 on the agenda because that number did not change.

Reviewed workstream readiness and next dates. We did **not** mark the whole project complete. Dana's reminder: the rolled-up percent is useful for the slide, but the four workstream statuses and exceptions still need to be shown.

Workstream round-robin

Incident Chronicle - Morgan / Service Assurance. The team tried the chronology labels against IR-2026-017 and they were readable. Formal review-packet checklist is still open; Morgan thinks it needs one more pass with Customer Ops.

Regional Change Windows is owned by Field Services with Release Operations support. CHG-2026-204 included UTC, local timezone, expected recovery, rollback threshold, and the handoff recipient. Leila called the pilot successful, then immediately added "one pilot." She wants another window before calling the workstream done.

Supplier Identity and Reconciliation is owned by Finance Controls. VRM-2026-09 distinguishes Aurora Components LLC, SUP-441, from Aurora Circuit Works Ltd., SUP-778. Noor: this fixes the supplier-name problem; it does not say either supplier shipped a bad part. Template ready. Reconciliation training booked, not yet delivered.

Program Review Notes

Customer Narrative Discipline - Marta, with Celeste reviewing. Draft shows the first message, correction, and final message together. Celeste does not want the customer's "erase it" email turned into a delete button; leave it in the correspondence.

Two A. Lins - correction

*Two participants could be abbreviated "A. Lin." Avery Lin is the Service Readiness Analyst responsible for source indexing. A. Lin is a Product Finance employee responsible for cost and reconciliation analysis. The draft attendee list and one action item used the abbreviation without a role. The chair clarified the assignments during the meeting. My draft line ~~Lin~~ review was useless on its own, so the assignments below use **full names and roles**.*

Action checklist

- [] Morgan Iqbal - complete the Incident Chronicle review-packet checklist by 2026-07-10.
- [x] Leila Grant - provide CHG-2026-204 pilot closeout to Program Delivery.
- [] Noor Patel - conduct supplier-identity control training by 2026-07-14.
- [] Marta Alvarez - complete customer-status template review by 2026-07-15.
- [x] Avery Lin - finish the project document index.
- [] A. Lin, Product Finance - deliver Q3 cost composition by 2026-07-08.
- [] Riley Okafor - publish the 2026-07-17 checkpoint invitation with UTC and attendee status.

Risks and decisions

Three open worries: ambiguous display names; summaries that make unlike updates sound the same; calendar changes announced only in chat. Q3 plan approved, but not every template is cleared for production. Riley asked that the cover slide stay amber - "green would be a little heroic."

Edit and follow-up history

Revision 1.1 corrects the action owner "A. Lin" to "A. Lin, Product Finance" for the cost-composition item and identifies Avery Lin separately for indexing. It also changes the Regional Change Windows status from "complete" to "pilot complete; workstream open." The original shorthand and status are preserved in this edit note so the reason for the revision remains visible.

Follow-up will occur at 15:00 UTC on 2026-07-17. The meeting invitation, not these notes, controls attendee status and any cancellation or reschedule.