



California Cannabis Track-and-Trace

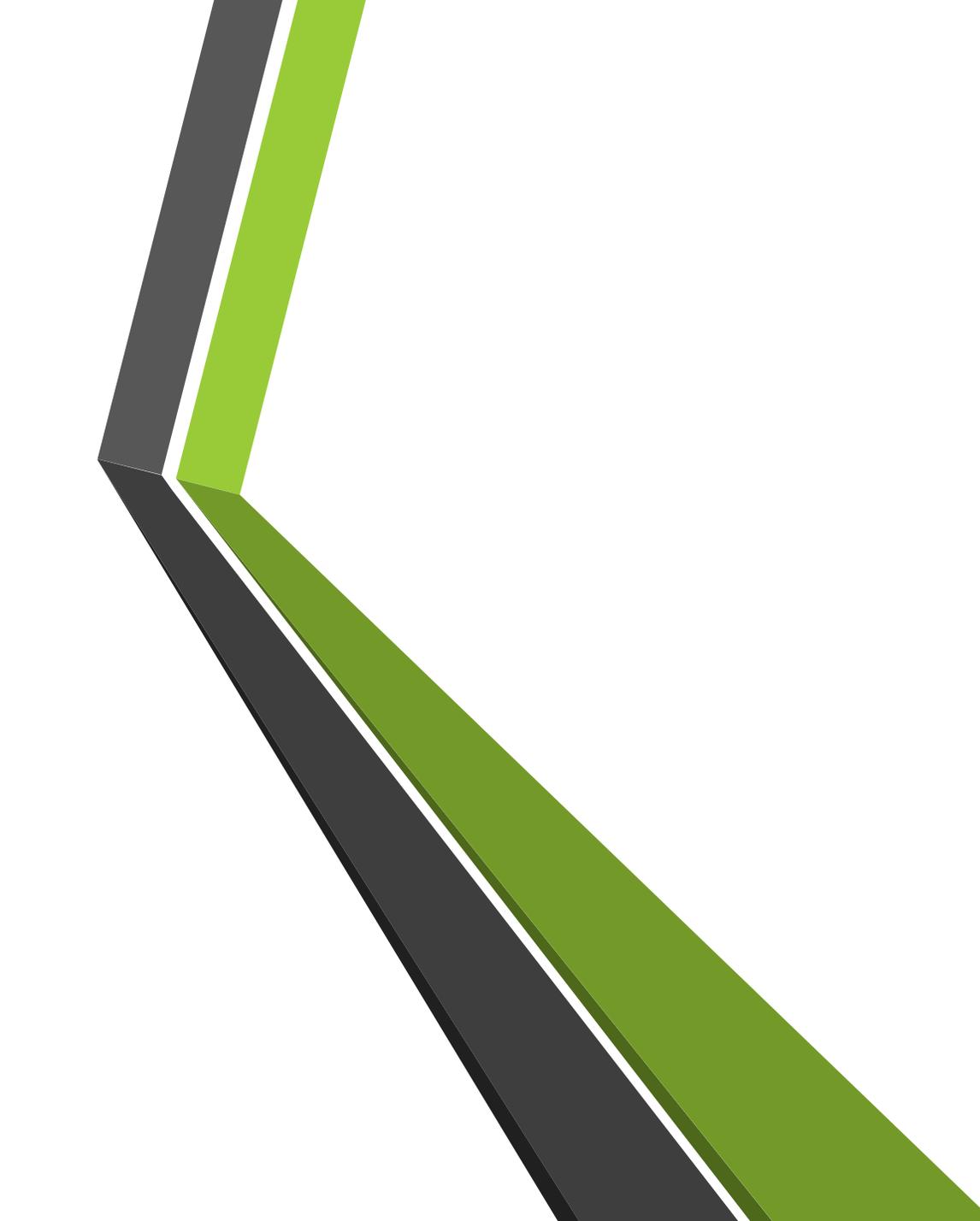
CCTT-Metrc
Educational Workshop

October 2019

Agenda

- Introduction and Agenda
- Frequently Asked Questions
 - Regulatory Overview
 - Metrc[®] Overview and Demonstration
- Support Resources
- Licensing Authorities and Metrc Available for Questions After Presentation





Frequently Asked Questions



What is an Account Manager?

What is an Account Manager

- Responsible for setting up CCTT Metric account for the licensed premises.
- Must be recognized by the licensing agency as an owner of the business.
- Automatically designated as the person who attests and submits the application.
- Responsible for adding and removing employees and maintaining an accurate and complete list of all users.
- Ultimately responsible for ensuring that inventory entered into the system is correct.



What Training Does the Account
Manager Need to Take?

Account Manager Training Requirements

- An Owner designated as an Account Manager must attend a Metrc New Business Account Manager Training.
- Metrc training will provide exposure to the Metrc processes for the entire distribution chain.
- Training must be taken before access to Metrc will be granted to an Account Manager.
- Training can be taken anytime after an application for an annual license has been submitted.
- The Account Manager only needs to complete a single course even if they are the Account Manager for multiple licenses.

Account Manager Training Availability

- The Account Manager New Business Training classes are provided as webinars and can be taken from anywhere using a computer.
- Classes are offered daily Monday through Friday and lasts approximately 2 ½ hours.
 - Recorded - Monday, Tuesday, and Thursday
 - Live - Wednesday and Friday

How to Register for Training

- Step 1 – Navigate to www.metroc.com/california and click the *Schedule Training Now* button.
- Step 2 – Enter the Application Number (not License Number) provided by the Licensing Authority and click the *Check* button.
- Step 3 – Select an Account Manager System Training class on the calendar and click the *Register* button.
- Step 4 – Provide the information below and click the *Complete* button:
 - Business Name
 - Email Address
 - First and Last Name
 - Phone Number
- Step 5 – You should receive a confirmation email within 24 hours.



How do I Get Credentialed as
the Account Manager?

How to Obtain Account Manager Access

- ❑ Step 1 – Take the Account Manager New Business Training class.
- ❑ Step 2 – Receive Licensing Authority approval of your license.
- ❑ Step 3 – Email Support@metrc.com to request credentialing. This must be done for each license. Include the following information:
 - Full Name of Account Manager
 - Email Address of Account Manager
 - Owner's Name
 - License Number
 - Phone Number
- ❑ Step 4 – Follow the instructions in the *Welcome to Metrc* email to set-up your password and user profile within 24 hours of receipt.





How do I Change the
Account Manager?

How to Change the Account Manager or Account Manager Contact Information

- Step 1 – Email Support@metrc.com to request credentialing of a new Account Manager or make a change to Account Manager contact information. Include the following information:
 - Full Name of Account Manager
 - Email Address of Account Manager
 - Owner's Name
 - License Number
 - Phone Number
- Step 2 – If Metrc Support is unable to process the request because there is a mismatch between the information provided and their records, contact the licensing authority to request the change. Provide the ticket number obtained in Step 1 to the licensing authority. Otherwise, proceed to Step 4.
- Step 3 – When the licensing authority approves the Account Manager change, again email Support@metrc.com, referencing the ticket number obtained in Step 1.
- Step 4 – Receive email and within 24 hours follow the instructions to set-up your password and user profile.

CDFA Account Manager and Account Manager Contact Information Change Requests




Account Manager Change Request

California Cannabis Track-and-Trace System

All annual and provisional licensees are required to use the CCTT-Metric system. Applicants approved to receive an annual or provisional license will not be provided access to the CCTT-Metric system until the designated account manager has completed the CCTT Account Manager New Business System Training.

If the current Account Manager intends to change the Designated Account Manager to another Owner listed on the license(s), please provide the following information in the sections below or in a separate email to CalCannabis_Enforcement@cdfa.ca.gov. All information provided must correspond with the information indicated on the license record(s).

Part A: Current Designated Account Manager

First Name:

Last Name:

Phone:

Email:

Part B: New Designated Account Manager

First Name:

Last Name:

Phone:

Email:

Part C: Annual/Provisional License Number(s)

License Number(s):

Part D: Metric Support Ticket Number

Ticket #:

For more information, please contact:
CalCannabis_Enforcement@cdfa.ca.gov




Account Manager - Request for Contact Information Change

California Cannabis Track-and-Trace System

If the Account Manager's contact information (phone number and/or email) requires an update prior to credentialing into CCTT-Metric, please provide the following information in the sections below, or in a separate email to CalCannabis_Enforcement@cdfa.ca.gov. The current contact information provided in Part B must correspond with the information indicated on the license record(s). Please only enter the contact information in Part B and Part C that is requesting to be changed.

Please select the contact information to be updated (select only one):

Phone Number
 Email Address
 Phone Number and Email Address

Part A: Account Manager Name (Required)

First Name:

Last Name:

Part B: Account Manager's Current Contact Information

Phone:

Email:

Part C: Account Manager's New Contact Information

Phone:

Email:

Part D: Annual/Provisional License Number(s)

License Number(s):

Part E: Metric Support Ticket Number

Ticket #:

For more information, please contact:
CalCannabis_Enforcement@cdfa.ca.gov



CDPH Account Manager and Account Manager Contact Information Change Requests

Questions for CDPH MCSB on credentialing or changing the account manager?

Contact MCSB.CCTT@cdph.ca.gov



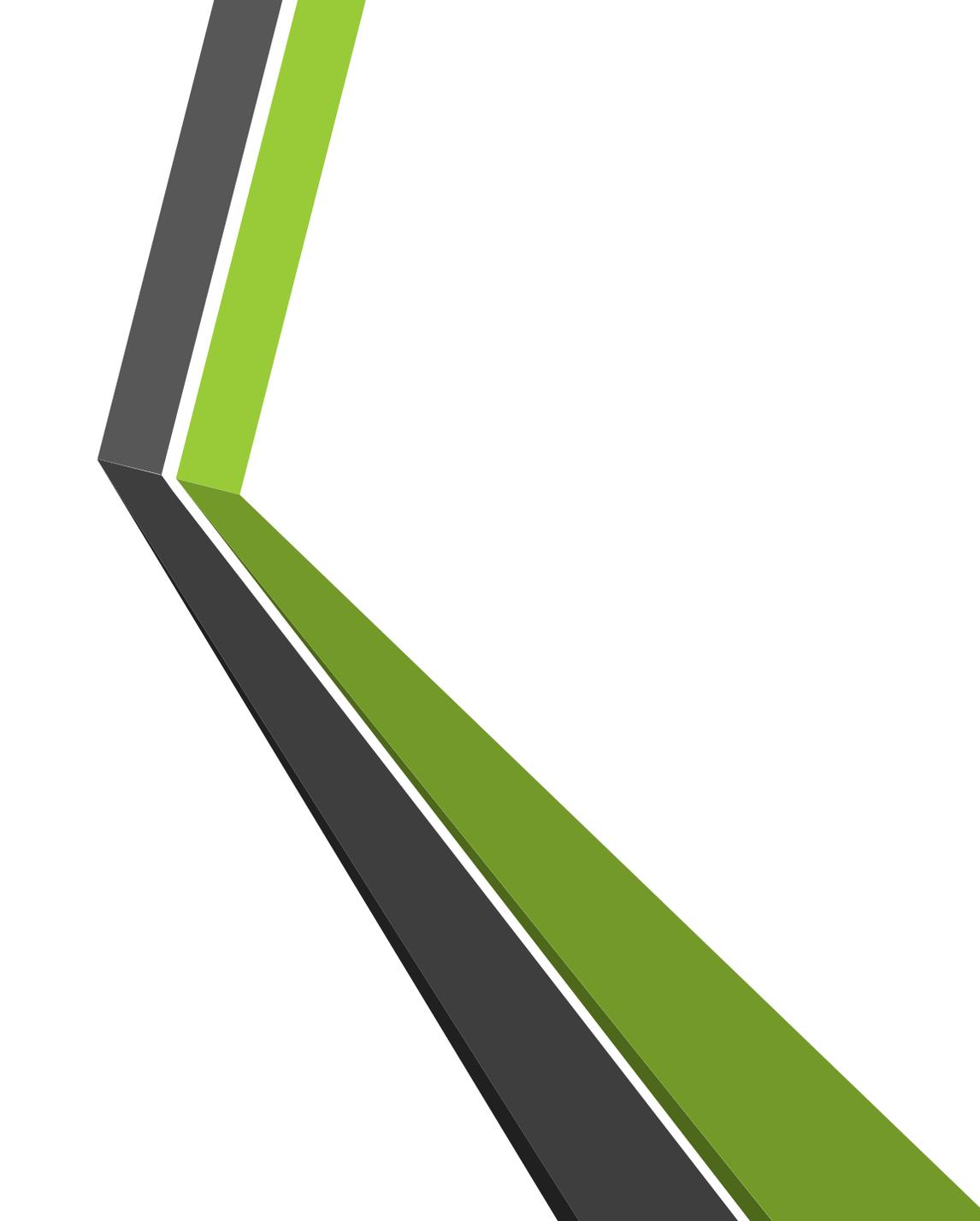
How do Employees Get
Access to Metric?

Managing Employees

- Employees must be granted access to CCTT Metric by the Account Manager or someone with administrative privileges.
- Only employees requiring access should be set-up in CCTT Metric and granted permissions specific to their job duties
- The Account Manager can grant trusted employees permissions to perform administrative actions such as managing employees, ordering tags, and setting up items.
- Account manager must ensure that all employees are trained to use the system, and understand the rules and regulations
- The licensee is responsible for all actions taken by owners and employees.
- Cancel access rights within 3 days if an individual is no longer authorized (CDFA)

Tips for Managing Employees in Metrc

- 👤 When setting up an employee, make sure that the “Home” page (the page they default to when logging into Metrc) is a page to which they have been granted permissions.
 - Example – Don’t set up Sally Johnson with a Home Page of Admin if Sally does not have Admin Permissions
 - Example – Don’t set up Joe Smith with a Home Page of Sales if Joe does not have Sales Permissions
- 👤 If an employee does not sign into their new Metrc account within 24 hours, they can use the link in the Welcome to Metrc email to reset their password.
- 👤 If the Welcome to Metrc email cannot be located, the Account Manager can request in Metrc that the Welcome email be resent.



How do I Order Tags?

Tag Requirements

- Five(5) Calendar Days to order tags:
 - CDFA §8403(a)
 - CDPH §40517
- Remember to receive your tags!
 - CDFA §8403(a)(3)
- Maintain a sufficient supply of tags:
 - CDFA §8403(a)(2) and
 - CDPH §40510(c)(5)
- CDFA requires you retain your “retired” UIDs for six (6) months
 - CDFA § 8400(d)(5)

Ordering Tags in Metrc

- 🔖 Tags are ordered from the Admin menu.
- 🔖 Tags will be sent by UPS (no PO Boxes).
- 🔖 No payment is required.
- 🔖 There is a limit to the number of tags that can be ordered at one time – the maximum amount will be shown on the Tag Orders page.
- 🔖 If more tags are needed than the maximum amount displayed, please contact your licensing authority.
- 🔖 The recommended minimum Tag Order is 50 for each type of tag.
- 🔖 Once the tag order has been placed it cannot be cancelled.

Receiving Tag Orders in Metrc

- After you physically receive your tags, return to the Tag Orders page and Receive your tags into Metrc.
- You must record the receipt of the tags in Metrc before the tags can be assigned to your inventory.
- Record the receipt of the tags before physically attaching the tags to plants and packages.



How do I Establish Inventory?

Requirements for Establishing Inventory - Cultivators

- § 8403. Track-and-Trace System Unique Identifiers (UID).
- § 8404. Track-and-Trace System User Requirements.
- §8405. Track-and-Trace System Reporting Requirements.
- § 8406. Track-and-Trace System Inventory Requirements.

Requirements for Establishing Inventory - Manufacturers

- §40517(b) All licensees in operation at the time they receive access to CCTT Metrc must enter their inventory within 30 days of receiving their UID tags.
- §40512(a) All cannabis activity must be entered in CCTT Metrc within 24 hours, including:
 - Receiving cannabis and cannabis product
 - Transfers
 - Changes to disposition of the product; e.g., packaging, processing
- §40282(b) Licensees must reconcile on-hand inventory of cannabis and cannabis products at the licensed premises within CCTT Metrc at least once every thirty (30) calendar days.

Requirements for Establishing Inventory - Distributors, Retailers and Microbusinesses

Please forward your existing inventory to bcctrackandtrace@dca.ca.gov.

Inventory should be in Excel format and contain the following information:

- Item Name
- Product Type (i.e., vape cartridge, tincture, edible)
- Quantity
- Batch ID

Upon receipt and review of your inventory, the Bureau will work towards enabling your tag ordering ability, at which time you can log into your Metric account to initiate your tag order.

Establishing Inventory

-  After receiving plant and/or package UID tags, cannabis and cannabis product inventory on the premises must be assigned UID tags and recorded in Metrc as required by regulations:
-  Cultivators and Microbusinesses licensed to perform cultivation activities assign a plant UID tag to all immature plant lots of up to 100 plants per lot, and will attach a plant lot label to each planting within the plant lot that reflects the 24-digit UID number corresponding to the plant tag assigned to the lot.
-  Cultivators and Microbusinesses licensed to perform cultivation activities assign individual UID plant tags to each flowering plant on the premises.
-  Cultivators and Microbusinesses licensed to perform cultivation activities assign package tags to all seeds and clones – cuttings or clones – tissue cultures that do not yet meet the definition of an immature plant.
-  ALL licensees assign UID package tags to any packaged product on the premises.
-  The California Transition Period Guide provides detailed instructions on recording inventory in Metrc.



What Type of Transfer
Should I Use?

Metric Transfers Overview

- A transfer must be created anytime a package moves from one licensed facility to another (even on same property).
- The destination facility can reject some or all of the packages.
- A rejected package will require the originating Licensee to receive the package back into inventory.
- Only Distributors and Microbusinesses with Distributor activities can transport packages.
- An exception is Testing Laboratories, which can transport packaged test samples.

New Licensed Transfer

Destination 1

Planned Route

Type - Select -

Est. Departure

Est. Arrival

Transport # 1

Employee ID

Driver's Name

Driver's Lic. No.

Phone No.

LAYOVER

Vehicle Make

Vehicle Model

License Plate

(transporter)

Package # 1

(package)

(destination)

metrc METRC®
CANNABIS TRANSPORTATION MANIFEST

All sales transactions are to be completed prior to transportation of any cannabis. The receiving entity may reject product delivered, but amount delivered must be limited to amount agreed upon in prior sales transaction.

Manifest No.:	0000017502	Date Created:	9/19/2018 2:29 PM
Originating Entity:	CannaFlower & Co	For Agency Use Only	
Originating License Number:	CAL18-0001102		
Address of Originating Entity:	782 Cannought's cir Rancho Cordova, CA 95670		
Phone No. of Originating Entity:	916-325-7985		

Destination # 1	Freedom Farms Cultivation	Destination Phone No.:	831-728-9700
Destination License Number:	CAL17-0000101	Date and Approx. Time of Departure:	9/19/2018 2:27 PM
Address of Destination:	1702 Freedom Blvd Suite 25 Freedom, CA 95019	Date and Approx. Time of Arrival:	9/19/2018 2:27 PM
		Date/Time Received:	9/19/2018 2:28 PM
Route to be Traveled:	test		
		Notes: details for extenuating circumstances (e.g., road closure, flat tire, etc.)	
Transporter # 1	Canna Bus Distribution	Non-layover	
Transporter License Number:	A12-2000512		
Address of Transporter:	1584 Cubbey Ct Folsom, CT 95630		
Contact Phone No. for Inquiries: 916-325-7985			
Name of Person Transporting:	Angus Snare	Employee ID of Driver:	1
State Driver's License No.:	C4588922	Signature of Person Transporting:	
Make, Model, License Plate No.:	Chevy Colorado 4F77588		
Package # 1	Production Batch No.	Item Name	Quantity
1A4FF0300000078000000056 Lab Test: NotRequired Status: Accepted		Aparna's Immature Item (Immature Plant)	Shp: 22.0000 ea Rcv: 22.0000 ea

PRODUCT REJECTION (if only a portion of shipment is rejected, circle that portion above)

Name of Person Receiving or Rejecting Product:

I confirm that the contents of this shipment match weight records entered above, and I agree to take custody of those portions of this shipment not circled above. Those portions circled were returned to the individual delivering this shipment.

Signature: **Date:**

Signature of individual taking receipt of rejected portion of this shipment:

Common Transfer Mistakes

- Using the wrong Transfer Type
- Not Receiving/Completing the Transfer
- Incomplete Elements of a Transfer
- Receiving Goods into Inventory that should have been Rejected
- What do I do if I notice an error?

Transfer Types

Transfer Type	Transfer Type Usage
Transfer	Used for all transfers except transfers requiring the use of a Wholesale Manifest or Return Manifest.
Return	A Return transfer is used only for the transfer of defective manufactured products back to the originating licensee.
Wholesale Manifest	<p>Used when transferring products to a Retailer licensee. The originator (Distributor or Microbusiness functioning as a Distributor) is required to record the wholesale price of each package in the transfer.</p> <p>It is recommended that Nurseries utilize a Wholesale Manifest when transferring seeds or immature plants to a Retailer.</p>

Transporters

-  Only Distributors and Microbusinesses with Distributor activities can transport packages.
-  An exception is Testing Laboratories, which can transport packaged test samples.
-  Before leaving the originating premises, the Transporter must verify that the information on the manifest is complete and correct.
-  At the time of departure from the originating licensed premises, the Transporter reports the departure time in Metrc.
-  Upon arriving at the destination premises, the Transporter reports the arrival time in Metrc.

Accepting and Rejecting Packages in a Transfer

- ✓ The content, quantity and quality of each package included in a transfer should be individually verified by both the origin and destination facilities.
- ✓ If the destination facility receives a package that varies slightly from the weight, volume, or count on the manifest and intends to keep the package, they must enter the adjusted weight, volume, or count as they receive the transfer into Metrc. If a package quantity varies greatly from the manifest, the destination facility must reject that package.
- ✓ Packages meeting content, quantity and quality expectations can be accepted by the destination facility, even if one or more packages on the manifest are rejected.
- ✓ It is in the destination facility's best interest to reject a package or an entire transfer if there are any questions about it.

Licensed Transfer or External Transfer in Metrc?

-  A *Licensed Transfer* is used for transfers between two annual/provisional licensees when both have access to Metrc.
-  An *External Transfer* is used for transfers between an annual/provisional licensee and a temporary licensee or annual/provisional licensee that does not yet have access to Metrc.
-  A transfer between two temporary licensees is done outside of Metrc using paper documents in accordance with regulations applicable to their license.

Completing Transfers in Metrc

The acceptance and rejection of packages in a transfer must be recorded in Metrc so that accepted packages are added to the inventory of the Destination licensee and rejected packages can be returned to the inventory of the Origin licensee.

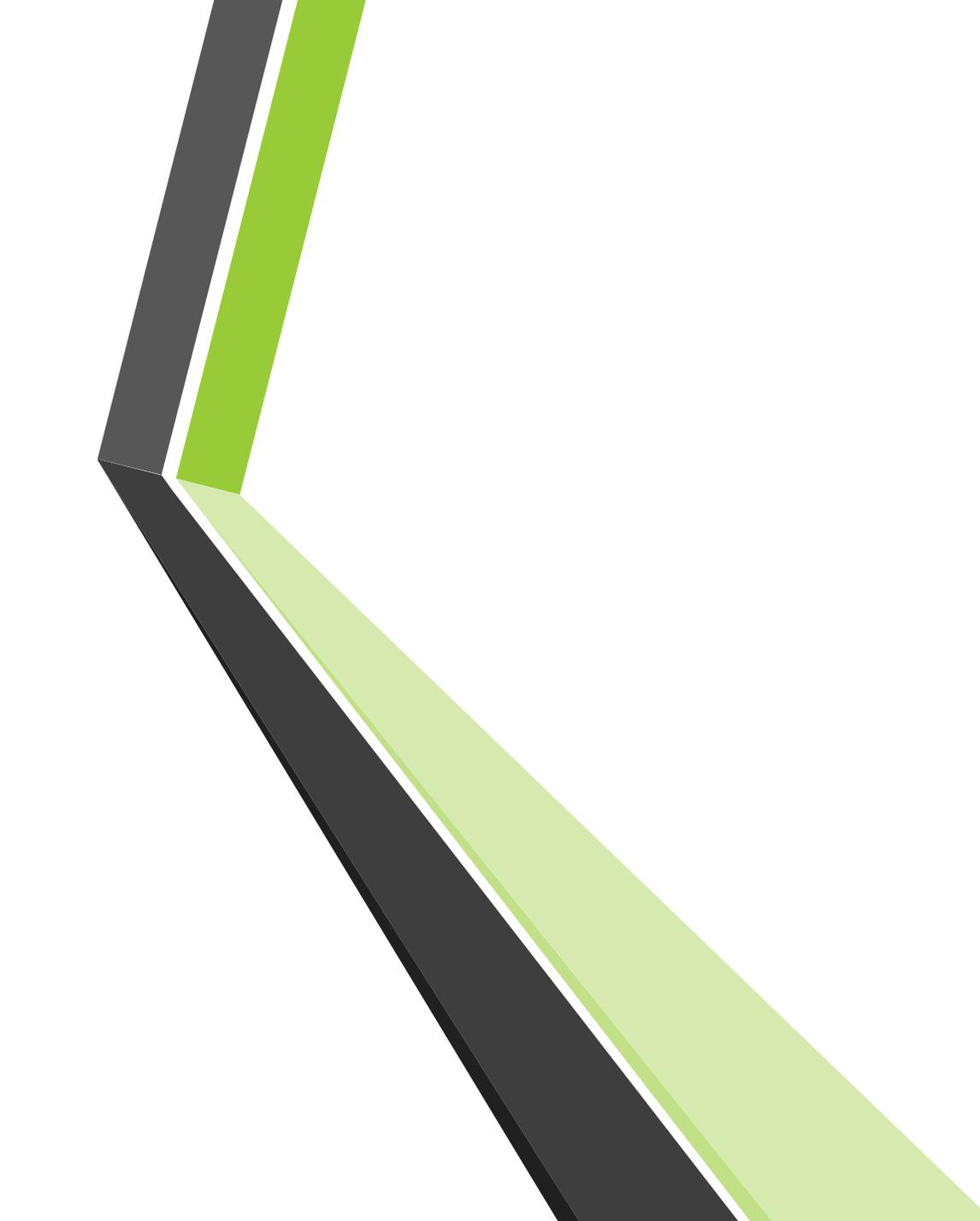
-  Licensed Transfers: Recorded by the Destination licensee by selecting the Receive button on the Incoming tab of the Transfers page.
-  Licensed Transfers – Returning Rejected Packages to Inventory: Recorded by the Origin licensee by selecting the Receive button on the Rejected tab of the Licensed Transfers page.
-  External Incoming Transfers: Recorded by the Destination licensee by selecting the Complete button on the Incoming tab of the External Transfers page.
-  External Outgoing Transfers: Recorded by the Origin licensee by selecting the Complete button on the Outgoing tab of the External Transfers page.



How and When Should I Adjust a Package?

Adjusting Packages in Metrc

- 🛒 If the current quantity in a package is different from the quantity recorded in Metrc, a package adjustment should be made.
- 🛒 The reason for the package adjustment must be recorded. Some common reasons for package adjustments are:
 - Scale Variance
 - Spoilage
 - Weight Change Due to Moisture
- 🛒 A complete list of *Adjustment Reasons* and their usage are available in the *California Supplemental User Guide*.



When and How Do I Finish a Package?

Finishing Packages in Metrc

- 🛍 When there is nothing physically remaining in a package, it should be marked as *Finished* in Metrc.
- 🛍 *Finishing* a package moves the package to the *Inactive* tab on the *Packages* page.
- 🛍 Only packages with a quantity of zero can be *Finished*. If there is a quantity remaining (positive or negative) in Metrc for a physically empty package, it is necessary to record a *Package Adjustment* to explain to the discrepancy to the State before *Finishing* the package.



Harvests

Harvests

- ☛ CDFA § 8406(b) Recording the net weight of all harvested cannabis once the majority of drying, trimming, and curing activities have been completed, or within sixty (60) calendar days from the initial harvest date, whichever is sooner;
- ☛ § 8405.(4)(A) The wet weight of each harvested plant, or portion thereof, which must be obtained by the licensee immediately after harvest of the plant, or portion thereof;
- ☛ § 8405.(4)(C) The weight of cannabis waste associated with each harvest batch;
- ☛ § 8405.(4)(D) The unique name of the harvest batch and the initiating date of the harvest. The initiating date of the harvest is the month, day, and year the first mature cannabis plant(s) in the harvest batch were cut, picked, or removed from the soil or other growing media. Ex: MM/DD/YYYY format.

Multi-strain Harvest vs. Multi-strain Package

- No Multi-strain Harvests! § 8000. (d) **“Batch” or “harvest batch”** means a **specifically identified quantity of dried flower or trim, leaves, and other cannabis plant matter that is uniform in strain or cultivar, harvested in whole, or in part, at the same time,** and, if applicable, cultivated using the same pesticides and other agricultural chemicals.
- Multi-strain Package – Is considered a package of cannabis that has been combined post-harvest at the point the product is considered a non-manufactured product. § 8000. (v) **“Nonmanufactured cannabis product”** means **flower, shake, leaf, pre-rolls, and kief that is obtained from accumulation in containers or sifted from loose, dry cannabis flower or leaf with a mesh screen or sieve.**

Multi-Strain Harvests in Metrc

- 🍃 Regulations require that all harvest batches be uniform in strain.
- 🍃 If a multi-strain harvest is created, steps must be taken to correct the harvest.
- 🍃 Early detection of the multi-strain situation simplifies the correction process.
- 🍃 It is suggested that you check the value in the *Strain* column on the *Plants* page - *Harvested* tab immediately after the initial harvest, after the addition of plants to the harvest, before recording harvest waste, and before creating any packages from the harvest.

Harvest Batch	Strain
▶ 🔍 * 2019-09-18-Harvest Room-H	(multi-strain)

Correcting Multi-Strain Harvests in Metrc When Detected within 48 Hours

- ✦ Either the entire harvest can be discontinued or the only the plants of the unintended strain can be removed from the harvest.
- ✦ This corrective action can only be taken if:
 - ✦ It is within 48 hours of the initial creation of the harvest
 - ✦ Harvest waste has not been recorded
 - ✦ Packages have not been created from the harvest

Correcting Multi-Strain Harvests in Metrc When Detected after 48 Hours

- Step 1 - Record the entire wet weight of the harvest as waste.
- Step 2 - Re-establish the harvested plants by creating immature plant batches in increments of 100 or less using the original planting date of the plants.
- Step 3 - Change the growth phase on the plants in the immature plant batches to flowering using the original change date of the plants.
- Step 4 - Harvest the flowering plants of the intended strain using the original harvest date.
- Step 5 - It is recommended that the original name of the harvest be used with a *Corrected* reference. For example:
 - 2019-09-18-Harvest Room-H - Corrected

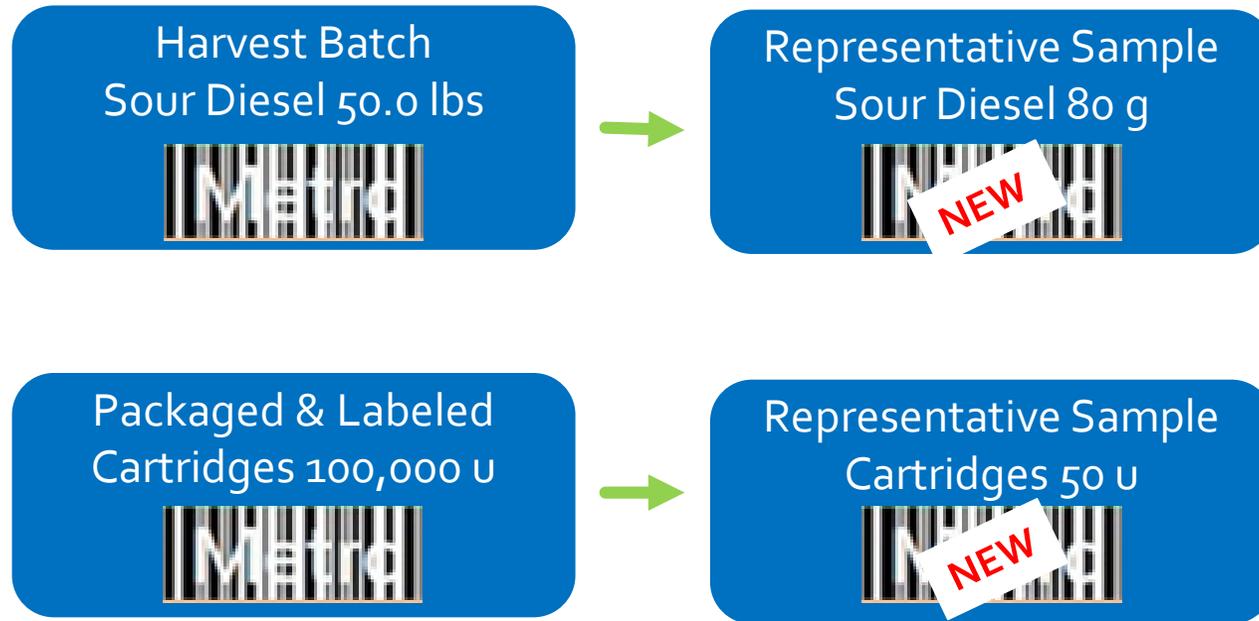
Finishing Harvests in Metrc

- 🍃 When there is nothing physically remaining in a harvest after packaging and disposing of any waste, it should be marked as *Finished* in Metrc.
- 🍃 *Finishing* a harvest moves the *Harvest Batch* to the *Harvested - Inactive* tab on the Plants page.
- 🍃 If there is any weight remaining in the *Harvest Batch* when *Finished*, it is attributed to moisture loss.



How are Packages Sampled for Regulatory Compliance Testing?

Obtaining the Representative Sample for Regulatory Compliance Testing in Metrc



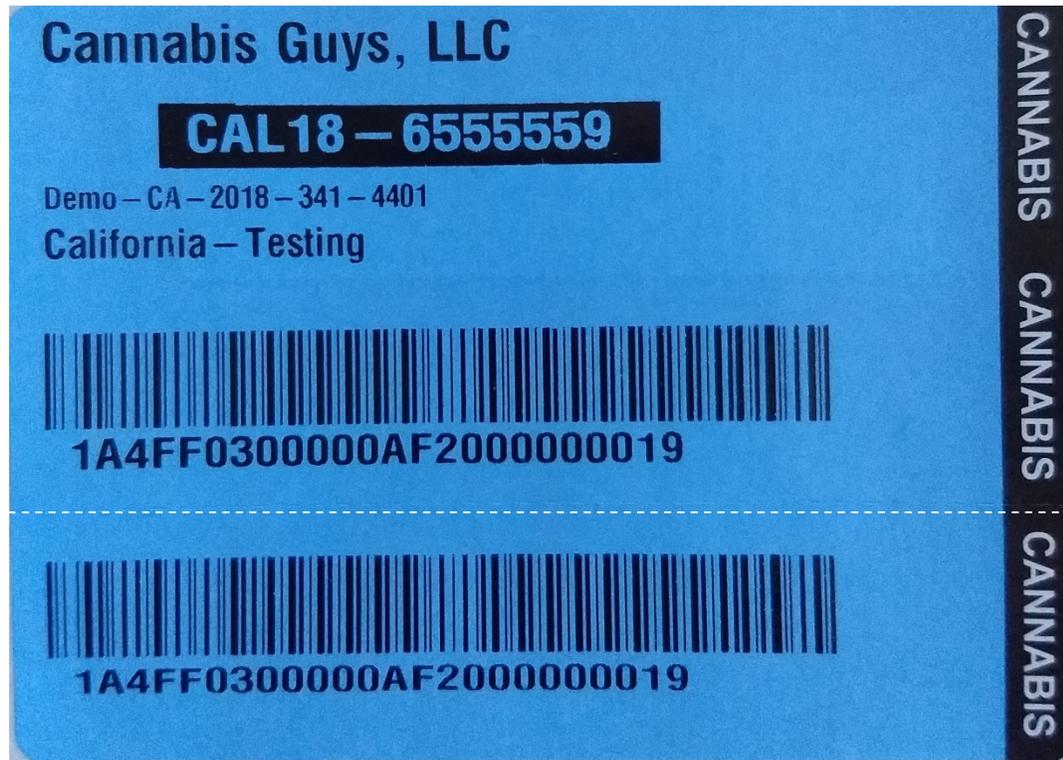
- ▶ The Distributor electronically assigns a new package UID to the representative sample that was physically obtained by the laboratory by highlighting the source package and selecting the *Submit for Testing* button.



- ▶ The test results recorded on the sample package are associated to the source package.

Tagging the Representative Sample for Regulatory Compliance Testing

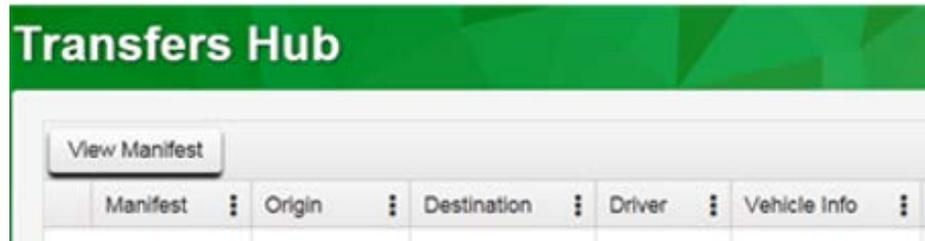
- ▶ Distributor provides the physical package tag to the Laboratory Sampler



Top portion of the tag must be affixed to the physical container holding the representative sample.

Bottom portion of tag may be used on the lab's intake paperwork i.e. COC.

Representative Sample Transfer in Metrc

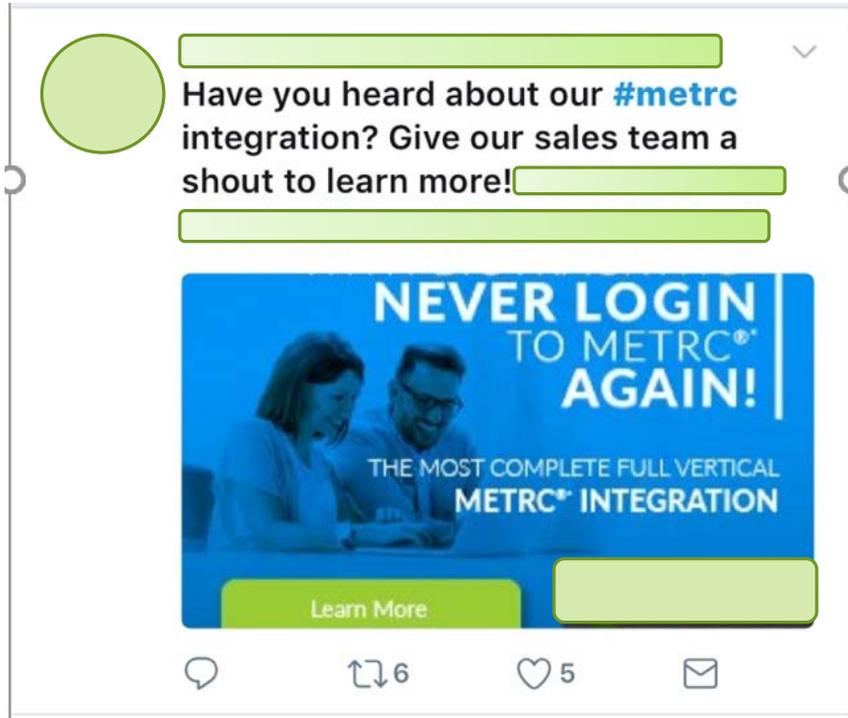


- The Distributor will create the electronic manifest for the transfer of the representative sample
 - On the manifest, the testing laboratory will be listed as the Transporter and the Sampler listed as the Driver
- The Laboratory Sampler will log into Metrc and, from the Transfer Hub screen:
 - Before leaving the distributor's premises and before reporting the manifest as "Departed", verify all info is correct
 - At the testing laboratory report the manifest as "Arrived"
- The Laboratory will receive the representative sample into their inventory
 - Metrc Incoming Licensed Transfers tab, select "Receive"
 - Before selecting "Receive", the laboratory will verify all sample info is correct - Electronic inventory must concur with physical inventory
 - If sample info is incorrect, the lab must "Reject" the electronic package



Do I Need to Purchase
Additional Software?

Use Caution and Seek Clarity



- Metrc does not outsource, partner or validate 3rd party companies
- Not all aspects of Metrc are available in the API
- Remember the State does not look at other systems only the system the State procured (Metrc)





Support Resources

Support Resources

California Licensing Authorities

- California Department of Food and Agriculture (CDFA): cannabis.cdfa.ca.gov
Cultivator licenses
- Bureau of Cannabis Control (BCC): www.bcc.ca.gov
Distributor, Retailer, Testing Laboratory and Microbusiness licenses
- California Department of Public Health (CDPH): www.cdph.ca.gov/mcsb
Manufacturing licenses

Metrc Support Tab

- **Metrc Manual/User Guide**
- **California Supplemental Guide**
- **Transition Period Guide**
- Mobile App Guide

Interactive Support

- E-mail Support@metrc.com
- Metrc Support Line 1-877-566-6506 – Monday - Friday 7 am PT to 7 pm PT

www.metrc.com/california

- Register for Training
- California Supplemental Guide
- Transition Period Guide

Training Courses

- Account Manager New Business Training
- **Coming Soon!** Advanced Training for:
 - Cultivators
 - Manufacturers
 - Distributors
 - Retailers
- **Coming Soon!** New Business Training for Non-Account Managers



Licensing Authorities and Metric Available for Questions After Presentation



Contact Information

Support Desk

877-556-6506

Support@metrc.com

www.metrc.com/california