

Bulletin Number: LA_IB_0003	Distribution Date: 7/22/19	Effective Date: 7/22/19
Contact Point: Metrc [®] Support	Subject: New Features in Met	rc
Reason: Metrc is providing an update or	n our newest feature releases fo	or the software.

Greetings Metrc Users,

Metrc is pleased to provide information on our newest enhancements within the software. Users will have a new package permission to manage "Package Notes" within the packages grid. Metrc is also adding more columns and information within the Sales Receipt, Packages, and Transfers grids for all license types that have the respective grids.

Metrc is also providing additional guidance regarding system configurations, Phasing/Tagging Plants and reporting of Waste.

Please find on the following pages a detailed description of the guidance and new functionality:



New Feature: Package Notes

Licensees will see a new permission available under the packages page for their employees. As seen in **Figure 1**, if a user is permitted to manage the "Notes" section, the user will then have the ability to create a note within any package in their facility. The note section is a free form field when creating a new package as shown in the New Packages form in **Figure 2**. A package note can be viewed within the history tab pictured in **Figure 3**. The notes feature can be used at the user's discretion to provide further detail about a specific package within a licensee's inventory, but it is not a requirement.

Add Employe	es			
Employee a	# 1			
Employee <u>Lic.</u> Number	 ☑ Enable online access to this Facility 	Permissions	Packages Page Grids (regid) Inventory	 View Manage Manage
E-mail			Notes	□ Manage
Home Employment	 Select Home - Owner at this Facility Manager at this Facility 		Transfers Menu Licensed & External Templates Hub	ManageManageManage
			Financials Menu All	Manage
			Reports Menu All	□ View
			Admin Menu Tag Orders Tags Strains Items Employees	 Manage Manage Manage Manage Manage

Figure 1: New Employee Permission for Package Notes



New Packages	5	×
New Packa	ge # 1	(clear)
New Tag	Type part of the Tag number	q 📀 (contents)
Room	Type part of the Room name	۹
ltem	Type part of the Item name	۹
Quantity	ex. 100.2: 💽 🛛 - Select - 🗸 🗸	·
Note		
Package Date	mm/dd/yyyy today	
	Production Batch	
	Product Requires Remediation	
+		
	Create Packages C	Cancel

Figure 2: New Package Form

Tag :	Src. H's	Src. Pkg's	Room	:	Item	: (Category	÷	Quantity	÷	<u>P.B.</u> :	<u>P.B</u>	No.	Lab Testing	-	<u>A.H.</u>	÷	Date	:	Rcv'd	:	
Q III ABCDEF012345670000014598 🌢	2018-06-23- Harvest Room-M	ABCDEF012345670000012253	Room 2		Buds - AK-47	E	Buds		2 g		No			SubmittedForTe	esting	No		06/14/2	019			×
Reg'd Lab Test Batches Lab Result	History																					
																			6	••][≡•	
Description			:	Er	mployee				:	D	ate	i s	Reported	:	Sour	rces		: Ext	ernal A	рр		:
Packaged 2 Grams of Buds - AK-47 fr - Took 2 Grams of Buds - AK-47 from - Package Type: Product Boom: Brown 2 Note: R&D Test Sample - Required LaD Test Batches: R&D Testing	om another Packa; Package ABCDEF(ge 012345670000012253		м	IETRC INDU	USTR	RY ADMIN (X0	0	•)	06	5/14/2019	0	06/14/2019 0	8:25 am	User							
Package's Lab Testing set to Submitte	dForTesting			м	IETRC INDU	USTR	RY ADMIN (X0	0	•)	06	6/14/2019	0	06/14/2019 0	8:25 am	User							
Page 1 of 1		20 v rows per page																Viewi	ng 1 - 3	2 (2 total)	Ċ)

Figure 3: Package History



New Feature: Change Package Notes

If a package has been created without a note, or a licensee would like to update a previously created note, they can use the Change Notes button as seen in **Figure 4**. The button will trigger the action window seen within **Figure 5** where a licensee can enter a new note. All updates to package notes will be captured within the package's history tab as seen in **Figure 6**.

ſ	Activ	e On Hold	Inactive																		
	Ne	w Packages	Submit for Testing	Remediate	Create Plantings	Unpack F	Plants	New Trans	sfer	Change R	toc	oms Change	Items	Change Req	d LT	Bs Change No	otes A	djust	Finish		
	_																_			<u>.</u>	■ •
		Tag	:	Src. H's	Src. Pkg's	÷	Room :	Item	:	Category :		Quantity	<u>P.B.</u>	<u>P.B.</u> No.	:	Lab Testing	<u>A.H.</u>	: [Date :	Rcv'd	
	Þ	Q 🚆 ABCDEF0	12345670000014598 💧	2018-06-23- Harvest Room-M	ABCDEF012345670000	0012253	Room 2	Buds - AK-47		Buds		2 g	No			SubmittedForTesting	No	o	6/14/2019		×

Figure 4: Packages Change Notes

Change Notes				×
Package #	1			(clear)
Package	ABCDEF012345670000014598	Q	Note	R&D Test Sample - Potency Only
+				
	Change Notes Car	ncel		

Figure 5: Change Package Notes

Tag :	Src. H's	Src. Pkg's	Room :	ltem :	Category :	Item Strain	: Quar	tity :	<u>P.B.</u> N	o. :	Lab Testing	: A.H.	: <u>D</u> a
Q # ABCDEF012345670000014598	2018-06-23- Harvest Room-M	ABCDEF012345670000012253	Lab Room	Buds - AK-47	Buds	AK-47	2 g				TestingInProgres	s No	06
Regid Lab Test Batches Lab Resul	ts History												
Description					Employee		:	Date	:	Reporte	ed :	Sources	:
Packaged 2 Grams of Buds - AK-47 - Took 2 Grams of Buds - AK-47 fron - Package Type: Product - Room: Room 2 Note: R&D Test Sample - Required Lab Test Batches: R&D Testing	from another Pac n Package ABCDI	kage EF012345670000012253			METRC INDU	STRY ADMIN (X00•	••)	06/14/2	2019	06/14/2	019 08:25 am	User	
Package's Lab Testing set to Submitt	edForTesting				METRC INDU	STRY ADMIN (X00.	••)	06/14/	2019	06/14/2	019 08:25 am	User	
Note: R&D Test Sample - Potency On	ily				METRC INDU	STRY ADMIN (X00•	••)			06/14/2	019 08:47 am	User	

Figure 6: Package History



New Column: Recorded Sales

The Sales Receipts grid now includes a 'Recorded' column representing the *actual* date/time the entry was created as shown in Figure 7. As a reminder, licensees can enter data into Metrc three ways (Manual, CSV, or API) and the recorded column represents the time Metrc receives the information from any of those entry sources.

ſ	Activ	ve Inactive										
	R	ecord Receipts	Edit Receipts F	inalize							ė-)=•
		Receipt :	Sales	Customer Type	Patient :	Caregiver :	Ident. Method	Packages :	Total	Recorded	Finalized :	
	•	000000166	06/27/2019 09:22 am	Patient	1			1	\$66.00	06/27/2019 09:22 am	No	Void
	•	000000156	05/21/2019 03:55 pm	Caregiver	4231	1324		1	\$50.00	05/21/2019 02:57 pm	No	Void
	•	000000151	04/23/2019 10:47 am	Patient	122545			1	\$10.00	04/23/2019 11:48 am	No	Void

Figure 7: Recorded Sales Receipts

Additional Information: Sales Receipts

The Sales Receipts grid now captures additional information for each package sold to a patient. When a user selects the drill-down arrow next to any package on a sales receipt they will now be able to reference the Requested Lab Test Batches, Lab Results, and History for the package as seen in Figure 8.

Act	ive		nacti	/e																							
F	Reco	ord F	Recei	ots	Edit F	eceipts) [F	inaliz	ze																	≜ •)[≡•
	F	Rece	ipt	:	Sales	;	:	Cus	stomer 1	Гуре	÷	Patient	:	Caregiver	- :	Ident.	Method	:	Pa	ackages	:	Total	:	Recorded	:	Finalized :	
-	0	0000	00166		06/27/	2019 09:2	2 am	Patie	ent			1							1			\$66.00		06/27/2019 09:22 ar	n I	No	Void
																										A -	
			Pack	age					÷	Item			:	Category		:	Item S	train		:	Quantit	y		Total	: 1	Recorded	:
			ABC	DEF01	234567	00000154	21			Cannalici	ous S	Shatter		Concentrate	(Each)						100 g			\$66.00	0	06/27/2019 09:22 am	
			R	eq'd La	ab Test I	Batches	Lab F	Results	s Hist	tory																	
														Please	select	a tab	to viev	v its c	onte	ent.							
		M		1	Page	1 of	1 () H	H) 2	20 v ro	ows p	oer page														Viewing 1 - 1 (1 to	otal) 🖒

Figure 8: Additional Package Information



New Columns: Item Information

Users will now see additional columns outlined in **Figure 9** available within the packages, transfers, and sales grid for item specific fields that are related to the package.

As a reminder, each item created by a licensee is associated to an item category. These categories have required fields setup by the regulatory authority. If a column is N/A, then that field is not required when creating an item for that specific category.



Figure 9: New Available Columns for Item Information



Additional Information: Sales Receipts

Users will now see additional information in **Figure 10** available when hovering over the magnifying glass of any package within their packages inventory or on an incoming transfer. This information is directly tied to the item created by the original licensee who created the package in Metrc.

As a reminder, each item created by a licensee is associated to an item category. These categories have required fields setup by the regulatory authority. If a column is N/A, then that field is not required when creating an item for that specific category.

	Туре	Product	
	Source Harvest(s)	2018-06-23-Harv	vest Room-H
20	Source Package(s)	ABCDEF012345	670000013771
aţ	Item	Brownies (1OZ)	
	Category	Infused-Edible	
'e	Item Strain	N/A	
- L	Unit CBD Percent	N/A	
	Unit CBD Content	N/A	
	Unit THC Percent	N/A	
Тас	Unit THC Content	N/A	
~ .	Unit Volume	N/A	
Q.	Unit Weight	16 oz	
	Item Serving Size	N/A	
٩	Item Supply Duration Days	N/A	
Viev	Unit Quantity	N/A	
۹.	Quantity	12 ea	
	Note	N/A	
	Production Batch	No	
9	Trade Sample	No	
	Initial Lab Testing	TestPassed	
	Lab Testing	TestPassed	
Q.	Lab Testing Date	04/19/2019	
	Process Val. Sample	No	
9	Product Requires Remediat	No	
	Contains Remediated Product	No	
	Administrative Hold	No	
q	Packaged Date	04/19/2019	
	Status	Active	

Figure 10: New Available Columns for Item Information



<u>Strains</u>

When creating strains users should ensure that all names are strain specific. Users should also not use generic names or acronyms for strains such as "Kief", "Trim", "Buds", "Sativa", and BD etc. See **Figure 11** which displays examples or incorrect and correct strain names.

	1	NC	ORRECT				CORRECT
Δ	d Strain		Edit Strains		•	AK-47	
-		15			•	Awesome High	
	Strain			:	•	Blue Dream	
۲	Buds				•	Chewbacca	
۲	DL				•	Colt 45	
►	DL2				•	Crazy High	
•	Kief				•	Danky Kong	
•	Trim				•	Diesel Robber	

Figure 11: Correct and Incorrect Strain Name Examples

Items

When users create items for their facility it is required that the item names in Metrc be item & strain specific. Users should not use generic names for items such as "Buds", "Strain", or "Flower". See **Figure 12** which shows examples of both incorrect or incorrect item names. It should also be noted that this may not apply to Infused Products because items created from a recipe which may not necessarily involve a single strain of Cannabis in the infusion or extraction process nor result in a strain specific item.



*	Blue Moon	Must be Strain AND Item	Buds	Buds
•	Bud	specific -	Buds	Buds
	Buds	Include Item & Strain Names	Buds	Buds
•	Buds - Blue D	ream	Buds	Buds
	Buds - Metrc I	Bliss	Flower	Buds
٠	Buds - TN Ora	ange Dream	Flower	Buds
	Clones - AK-4	7	Immature Plants	Plants
•	Clones - Blue	Dream	Immature Plants	Plants
	Clones - TN C	range Dream	Immature Plants	Plants

Figure 12: Correct and Incorrect Item Name Examples

Tagging Plants

All plants should be physically and electronically assigned a plant RFID tag once they reach 8 inches tall (shown in **Figure 13**)



Figure 13: Proper Tag Attachment Example

To properly attach the Metrc plant tag follow these steps:

- 1. Loop the plant tag strap through a single notch on one end of the plant tag
- 2. Wrap the tag around the trunk of the plant above the first branch
- 3. Lock it in place so that the plant tag hangs down next to the trunk

The plant tags should be visible and reachable. Attaching tags this way will improve visibility and utility of the bar codes. *Do not leave the tags in the soil, in dense foliage or hanging off of the sides of containers.*



Phasing Plants

Users **may not** skip plant phases. This means that plants must be moved from immature to vegetative before being moved to the flowering phase (**Figure 14**).

ants								
Step 1		Step 2	Step 3					
Immature	Inactive	Vegetative	Flowering	On Hold	Inactive		Additives	Wast



Auto-flowering (Fast-flowering) Plants

For plants that are auto or fast flowering, cultivators should ensure that the plants are first moved to the Vegetative Phase and assigned a plant tag. Users should not be moving plants into the flowering phase until the plant begins to flower and produce buds. If the cultivator has this type of plant, then they should contact the Regulatory Authority to inform them that they have auto-flowering plants.



Waste & Destroyed Plants

Waste must be documented and reported in the appropriate areas of Metrc. We have broken waste reporting into four categories to identify the areas where and how you will report waste differently:

- Pre-Harvest Waste
 - Destroyed Plants
- Harvest Waste
- Package & Production Waste

Pre-Harvest Waste

All Cultivation facilities must document and report any/all plant waste including plant waste generated prior to the harvest. This "Pre-Harvest Waste" should be recorded on your waste log within Metrc.

Report pre-harvest waste by the end of each business day, to ensure that the Metrc inventory matches the actual inventory in the facility.

Please remember that aside from reporting this waste material in Metrc, you must also follow all of the state rules & regulations regarding the physical destruction and/or disposal of Cannabis plant material.

- Pre-Harvest waste does not have to be recorded strain specific
- Pre-Harvest waste may be recorded in bulk & with multiple strains by room (Figure 15) or by plant groupings (Figure 16)
- You must select a "Waste Method" & "Waste Reason" when reporting waste in the waste log (Figure 17):
 - Waste Methods:
 - Grinding with compostable Material
 - Grinding with non-compostable material
 - Other method approved by the Department

• Waste Reasons:

• Pruning

Immature Ina	ctive Vegetativ	e Flowering	On Hold Inactive	e Additives	Waste	Harvested	On Hold	Inactive	
Record Waste	by Room								
Waste Met	hod	i Ma	terial Mixed	1	Waste	:	Reason		Total Plants
	Dana		20			No data	is avai	lable to	display.

Figure 15: Record Waste by Room



ants			
Immature Inactive Vegetative Flowering On Hold I	Inactive Additives	Waste Harvested	On Hold Inactive
Assign Tags Replace Tags Change Room Change Growth P	hase Changes by Room	Destroy Record Addit	ives Record Waste
Tag	Strain	Room	Hold
ABCDEF012345670000011304		Veg Room A	
ABCDEF012345670000011305			
ABCDEF012345670000011307		Veg Room A	
ABCDEF012345670000011309			
ABCDEF012345670000011310		Veg Room A	

Figure 16: Record Pre-Harvest Plant Waste by Individual Plants or Groups

Waste	Record Room	Plants Waste						×
	Room Wast	e # 1						(elear)
	Waste Method	- Select -		•	Room	Type part of Ro	om name	٩
	Material Mixed							
	Waste Weight	ex. 100.23 - Sel	ect -	•				
	Reason	- Select -		•				
	Optional Note							
	Waste Date	🗰 mm/dd/yyyy t	oday					
	+							
		Decord	Can	col]				

Figure 17: Record Waste Weight, Method, Reason, Date, and Time (include note)



Harvest Waste

All waste physically created from a single strain-specific Harvest Batch must be reported to that single, strain-specific Harvest Batch within Metrc.

- Waste should be reported for all sticks and stems produced from a harvest
- You may not combine waste from other Harvest Batches or strains
- You may not guess, estimate, round or otherwise manipulate the data
- Moisture Loss (Figure 18)
 - o Moisture loss should not be reported in the harvest batch area as waste
 - Moisture loss should be left in the Harvest Batch
 - Moisture loss will be shown in the "Moisture Loss" column in the "Inactive" section of your Harvests tab upon finishing the harvest batch

Additives	Was	te	Harve	ested	On Hold	1	nactive		
1	Moistu ab afte	re Loss wi er you hav	ll only e repo	be shown rted Wast	on "Finis te and crea	heo	l" Harvest d your Pac	s in th kages	e Inactive
Wet <u>Wgt.</u>	:	Waste	:	Total Pk	g'd		Pkg's	:	Moist. Loss
5,450.88 g		1,675.88 g	1	1,000 g			2		2,775 g
6,747.75 g		1,643.19 g	1	1,000 g			2		4,104.56 g
5,313.52 g		1,502.36 g	1	2,267.96	19 g		1		1,543.1982 g
5,249.79 g		1,605.42 g	1	1,000 g			2		2,644.37 g
5,139.41 g		1,503.69 <u>g</u>	1	1,000 g			2		2,635.72 g
5,119.1 g		1,506.87 g		2,767.96	19 g		2		844.2682 g
5,223.54 g		1,560.65 g	,	500 g			1		3,162.89 g
5,273.18 g		1,666 1 g		1.000 g			2		2.607.08 a

Figure 18: Moisture Loss



Package & Production Waste

Waste that is created after product has been packaged must be reported as a Package Adjustment to the specific Package that product was removed from (**Figure 19**). This includes but is not limited to:

- Items that have dropped, opened, broken, are leaking or otherwise contaminated
- Items that have failed testing
- Items that have been ordered for destruction by the state
- Items that have spoiled/expired
- Residual waste from production methods or extractions

	<u>Manage nome</u>		- minear	1						
em	1	Category	:	Quantity	1	<u>P.B.</u>	1	<u>P.B.</u> No	. 1	Lab Test
hocolate Chip Cooki	ies - 100mg	Edible	i i	50 ea	_	1931				NotSubm
djust Packag	jes									×
Package #	1			Sele Adju "Dry	ct a a stme ing" e	pre-def nt such etc.	fined r as "W	easo <mark>n</mark> foi aste", "T	the heft",	(clear)
Package	1A4FF03000000	0900000082	Q Q	Rea	ason	Wast	te			•
Adj. Quantity	-10 🗘 E	Each	v	Optional	Note	Spoil	ed - E:	xpired 01	/01/18	
	Removing - new tot	al will be 40 ea	uantity	Adj.	Date	m 0	6/29/2	2018	today	
	And a number to re	educe the quan	tity.	Make su are adju	ire yo isting	u inclu the Pac	de not kage	es to exp	lain why	you
+	Always check your	calculations								
	Adius	l Packages	Cance	el						

Figure 19: Package Adjustment for Waste



METRC – INDUSTRY TRAINING

Metrc provides industry training & education workshops in person and online as well as training guides and videos.

- You must attend at least one New Business (Level 1) class online before you may register for other classes
- We recommend that all industry users take classes every 3-4 months to stay updated on new features or changes
- Training Videos are also available on You Tube: <u>https://www.youtube.com/channel/UCcasu4orlpyqqEmQWWOkW0w</u>

Online classes available:

- Metrc New Business (Level 1) All Facilities (due to the size of the program, these are made available periodically and if you would like to request a class, please contact Metrc support)
- Metrc Advanced (Level 2) (see above)
- Metrc Advanced Testing Facility Only (Level 2) (Not available via scheduler)



METRC - INDUSTRY SUPPORT

Metrc provides live interactive support for industry users and licensees. This information can be found on our website, when logged into Metrc under your Support tab and listed below.

Check under the "Support" tab for additional resources.

 Support ✓
Manual / User Guide
Louisiana Supplemental Guide Beginning Inventory
CSV Formatting Guide Industry Reports Guide Proper RFID Tags Attachment
Customer Support: - https://support.metrc.com/ - support@metrc.com
- 1-8/7-566-6506 Sign up for Training Training Videos
Technical Support

Please be advised that the new <u>CSV Formatting Guide</u> is now located under the Support Tab when logged into Metrc.

Please feel free to contact support at <u>support@metrc.com</u> or 877-566-6506 with any questions.



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Page 18 | 17