

Metrc Support Bulletin



Bulletin Number: LA_IB_0003	Distribution Date: 7/22/19	Effective Date: 7/22/19
Contact Point: Metrc® Support	Subject: New Features in Metrc	
Reason: Metrc is providing an update on our newest feature releases for the software.		

Greetings Metrc Users,

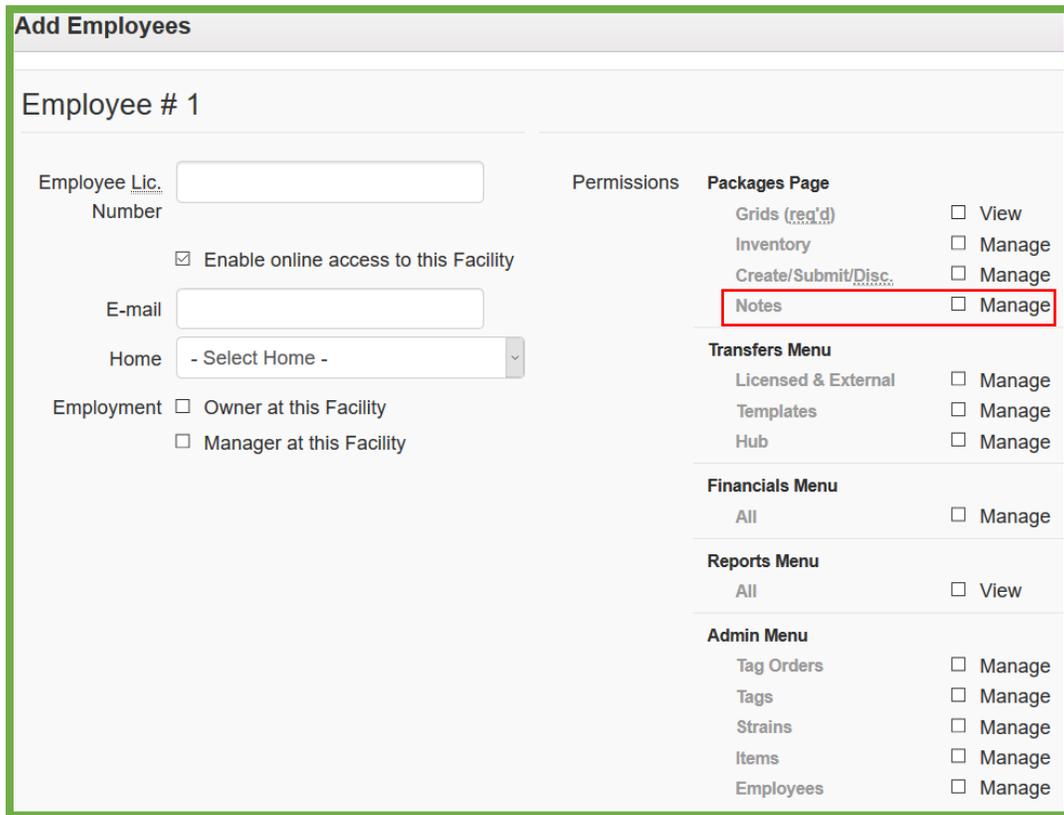
Metrc is pleased to provide information on our newest enhancements within the software. Users will have a new package permission to manage “Package Notes” within the packages grid. Metrc is also adding more columns and information within the Sales Receipt, Packages, and Transfers grids for all license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

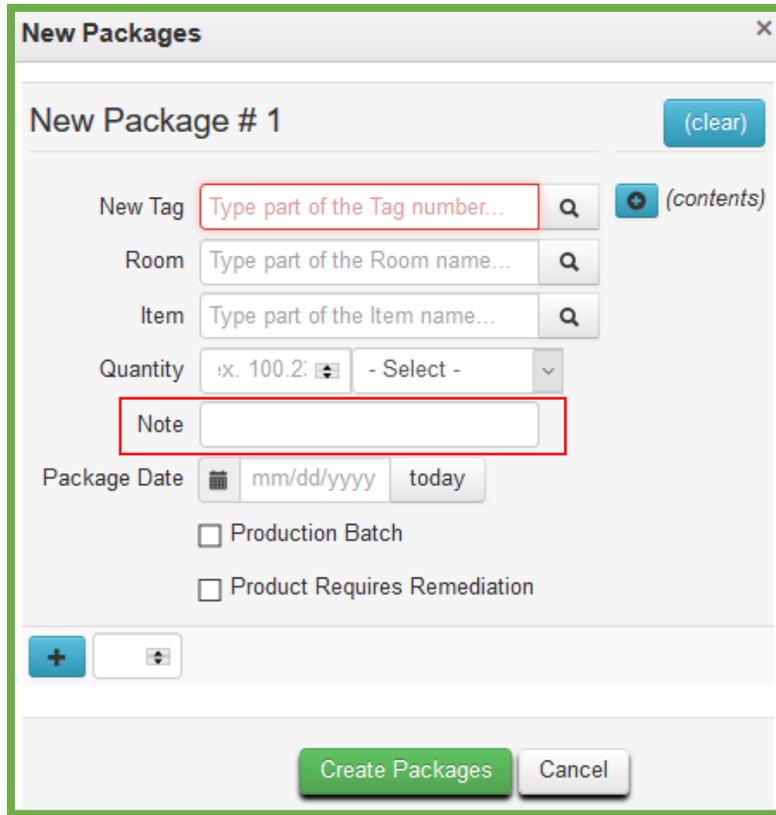
Licensees will see a new permission available under the packages page for their employees. As seen in **Figure 1**, if a user is permitted to manage the “Notes” section, the user will then have the ability to create a note within any package in their facility. The note section is a free form field when 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.



The screenshot shows the 'Add Employees' form with the following details:

- Employee # 1**
- Employee Lic. Number:** [Text Input Field]
- Enable online access to this Facility**
- E-mail:** [Text Input Field]
- Home:** - Select Home - [Dropdown Menu]
- Employment:**
 - Owner at this Facility
 - Manager at this Facility
- Permissions Packages Page:**
 - Grids (req'd) View
 - Inventory Manage
 - Create/Submit/Disc. Manage
 - Notes Manage** (highlighted in red)
- Transfers Menu:**
 - Licensed & External Manage
 - Templates Manage
 - Hub Manage
- Financials Menu:**
 - All Manage
- Reports Menu:**
 - All View
- Admin Menu:**
 - Tag Orders Manage
 - Tags Manage
 - Strains Manage
 - Items Manage
 - Employees Manage

Figure 1: New Employee Permission for Package Notes



New Packages

New Package # 1 (clear)

New Tag + (contents)

Room

Item

Quantity - Select -

Note

Package Date today

Production Batch

Product Requires Remediation

+ +

Create Packages Cancel

Figure 2: New Package Form

Tag	Src. H's	Src. Pkg's	Room	Item	Category	Quantity	P.B.	P.B. No.	Lab Testing	A.H.	Date	Rcv'd
ABCDEF012345670000014598	2018-06-23-Harvest Room-M	ABCDEF012345670000012253	Room 2	Buds - AK-47	Buds	2 g	No		SubmittedForTesting	No	06/14/2019	

Description	Employee	Date	Reported	Sources	External App
Packaged 2 Grams of Buds - AK-47 from another Package - Took 2 Grams of Buds - AK-47 from Package ABCDEF012345670000012253 - Package Type: Product - Room: Room 2 - Note: R&D Test Sample - Required Lab Test Batches: --- R&D Testing Package's Lab Testing set to SubmittedForTesting	METRC INDUSTRY ADMIN (X00...)	06/14/2019	06/14/2019 08:25 am	User	

Page 1 of 1 | 20 rows per page | Viewing 1 - 2 (2 total)

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**.

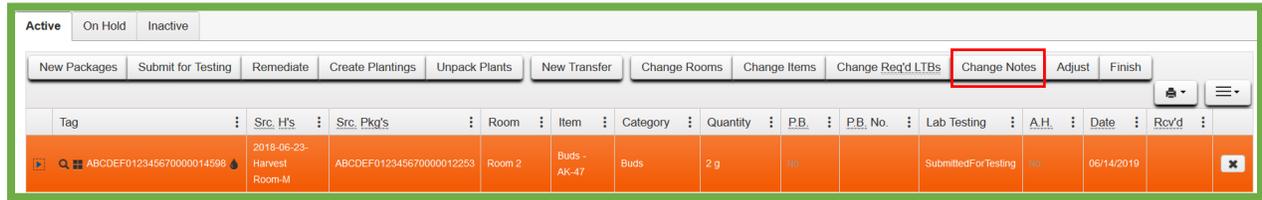


Figure 4: Packages Change Notes

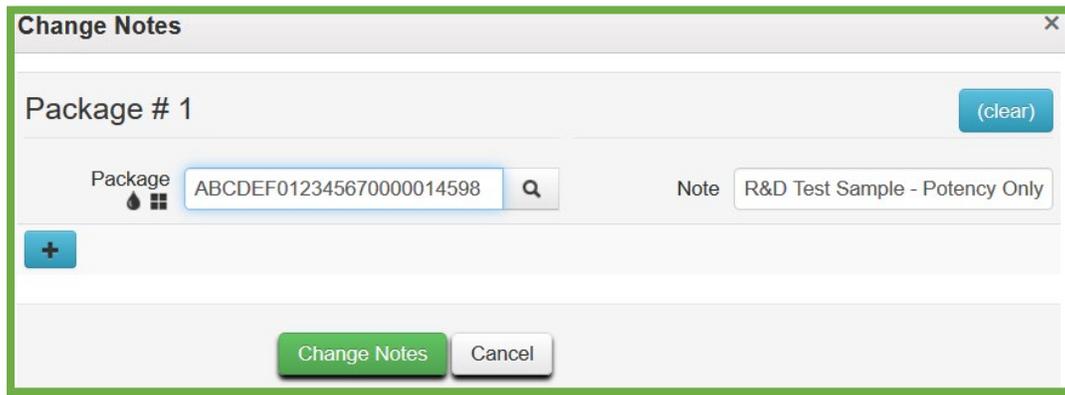


Figure 5: Change Package Notes

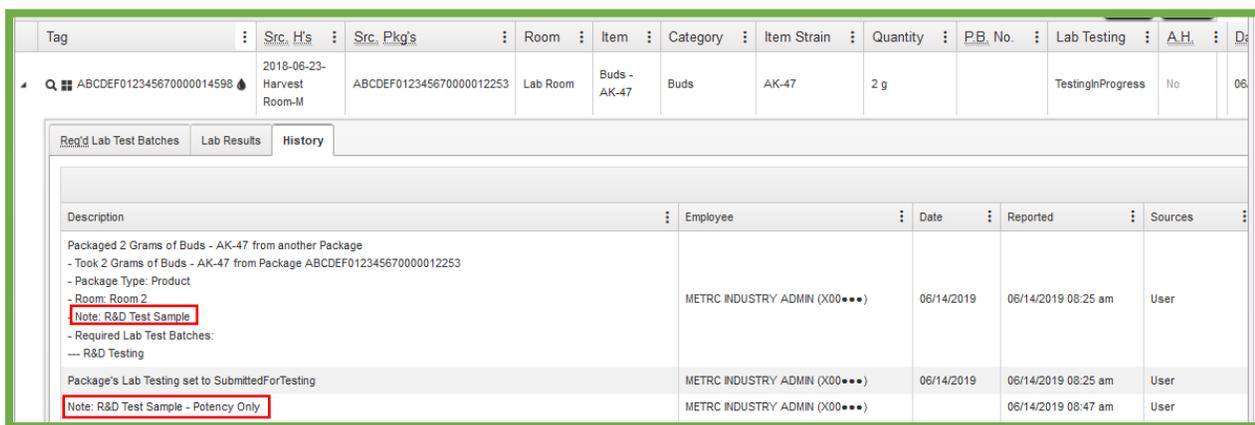
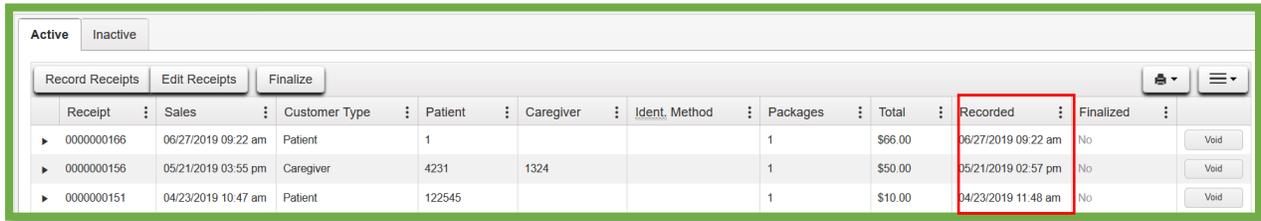


Figure 6: Package History

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.

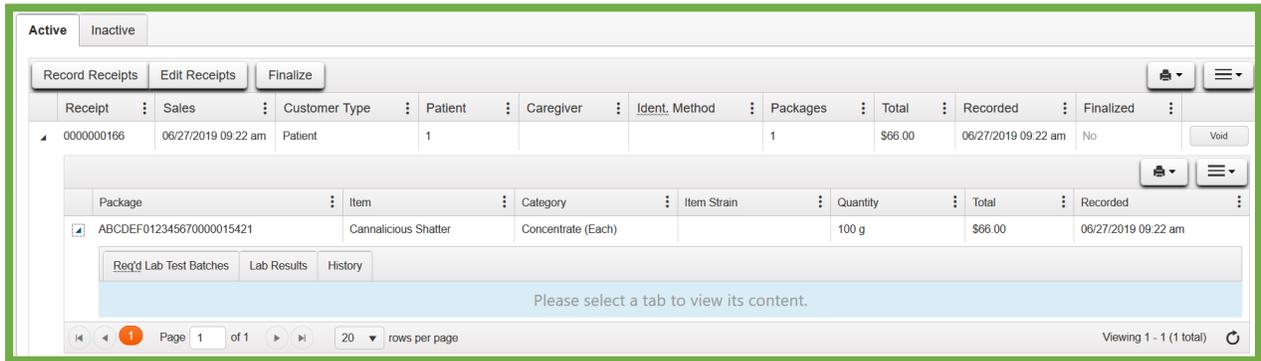


Receipt	Sales	Customer Type	Patient	Caregiver	Ident. Method	Packages	Total	Recorded	Finalized	
▶ 0000000166	06/27/2019 09:22 am	Patient	1			1	\$66.00	06/27/2019 09:22 am	No	Void
▶ 0000000156	05/21/2019 03:55 pm	Caregiver	4231	1324		1	\$50.00	05/21/2019 02:57 pm	No	Void
▶ 0000000151	04/23/2019 10:47 am	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.



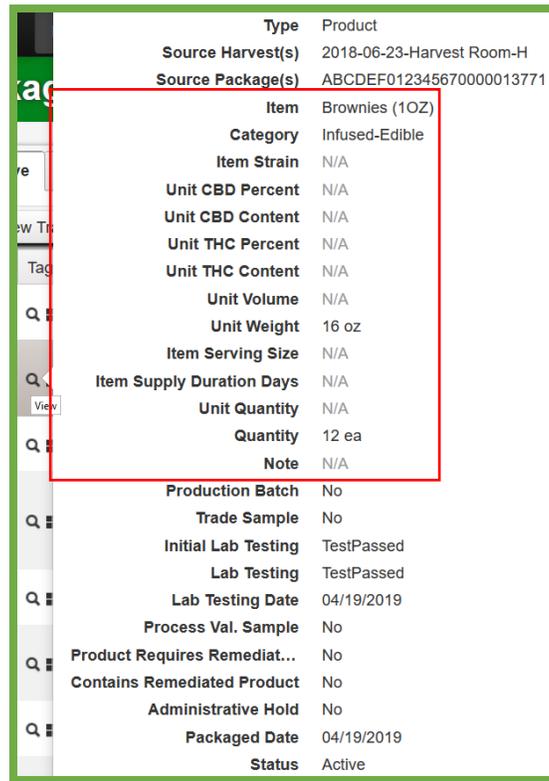
Receipt	Sales	Customer Type	Patient	Caregiver	Ident. Method	Packages	Total	Recorded	Finalized															
▲ 0000000166	06/27/2019 09:22 am	Patient	1			1	\$66.00	06/27/2019 09:22 am	No	Void														
<table border="1"> <thead> <tr> <th>Package</th> <th>Item</th> <th>Category</th> <th>Item Strain</th> <th>Quantity</th> <th>Total</th> <th>Recorded</th> </tr> </thead> <tbody> <tr> <td>ABCDEF012345670000015421</td> <td>Cannalicious Shatter</td> <td>Concentrate (Each)</td> <td></td> <td>100 g</td> <td>\$66.00</td> <td>06/27/2019 09:22 am</td> </tr> </tbody> </table>											Package	Item	Category	Item Strain	Quantity	Total	Recorded	ABCDEF012345670000015421	Cannalicious Shatter	Concentrate (Each)		100 g	\$66.00	06/27/2019 09:22 am
Package	Item	Category	Item Strain	Quantity	Total	Recorded																		
ABCDEF012345670000015421	Cannalicious Shatter	Concentrate (Each)		100 g	\$66.00	06/27/2019 09:22 am																		
<div style="display: flex; justify-content: space-between;"> Req'd Lab Test Batches Lab Results History </div> <div style="text-align: center; background-color: #e0f0ff; padding: 5px;">Please select a tab to view its content.</div>																								

Figure 8: Additional Package 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 Metric.

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.



Type	Product
Source Harvest(s)	2018-06-23-Harvest Room-H
Source Package(s)	ABCDEF012345670000013771
Item	Brownies (1OZ)
Category	Infused-Edible
Item Strain	N/A
Unit CBD Percent	N/A
Unit CBD Content	N/A
Unit THC Percent	N/A
Unit THC Content	N/A
Unit Volume	N/A
Unit Weight	16 oz
Item Serving Size	N/A
Item Supply Duration Days	N/A
Unit Quantity	N/A
Quantity	12 ea
Note	N/A
Production Batch	No
Trade Sample	No
Initial Lab Testing	TestPassed
Lab Testing	TestPassed
Lab Testing Date	04/19/2019
Process Val. Sample	No
Product Requires Remediat...	No
Contains Remediated Product	No
Administrative Hold	No
Packaged Date	04/19/2019
Status	Active

Figure 10: New Available Columns for Item Information

Strains

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 of incorrect and correct strain names.

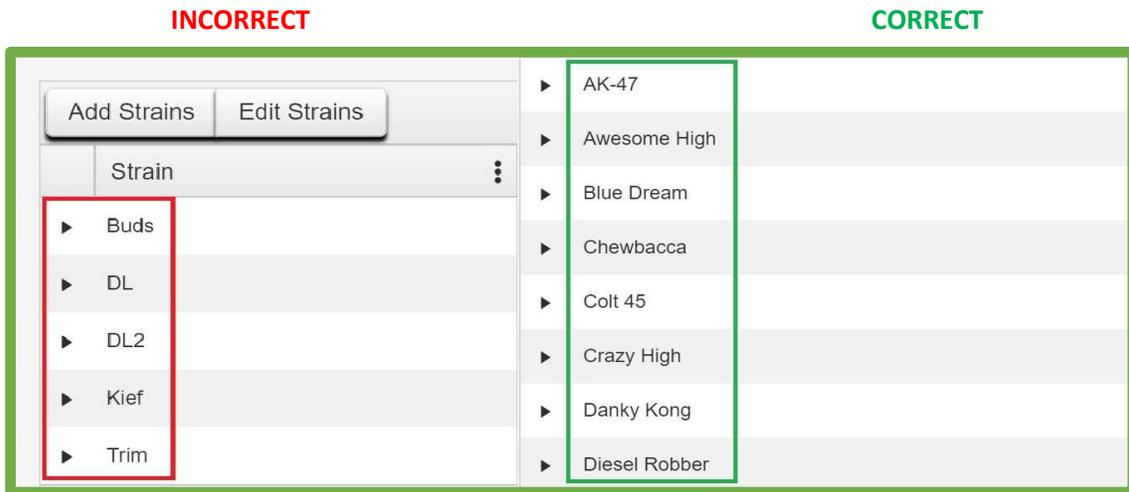


Figure 11: Correct and Incorrect Strain Name Examples

Items

When users create items for their facility it is required that the item names in Metric 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 specific - Include Item & Strain Names	Buds	Buds
▶ Bud		Buds	Buds
▶ Buds		Buds	Buds
▶ Buds - Blue Dream		Buds	Buds
▶ Buds - Metrc Bliss		Flower	Buds
▶ Buds - TN Orange Dream		Flower	Buds
▶ Clones - AK-47		Immature Plants	Plants
▶ Clones - Blue Dream		Immature Plants	Plants
▶ Clones - TN Orange 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**).



Figure 14: Plant Phase Steps

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*

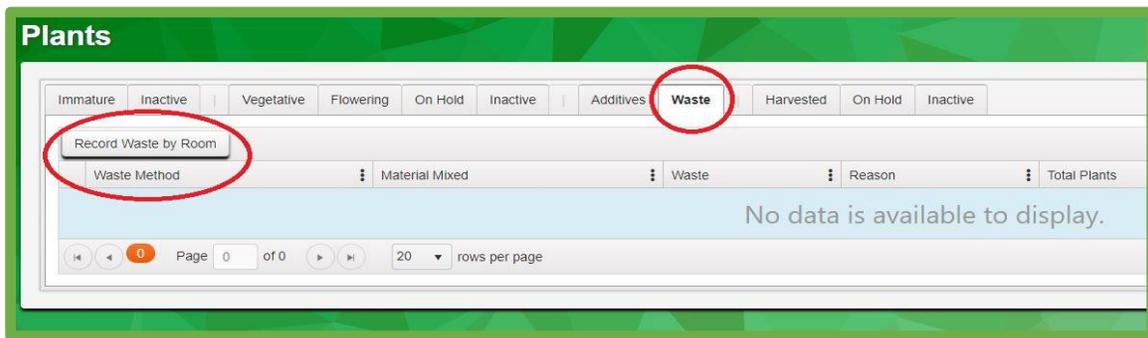


Figure 15: Record Waste by Room



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

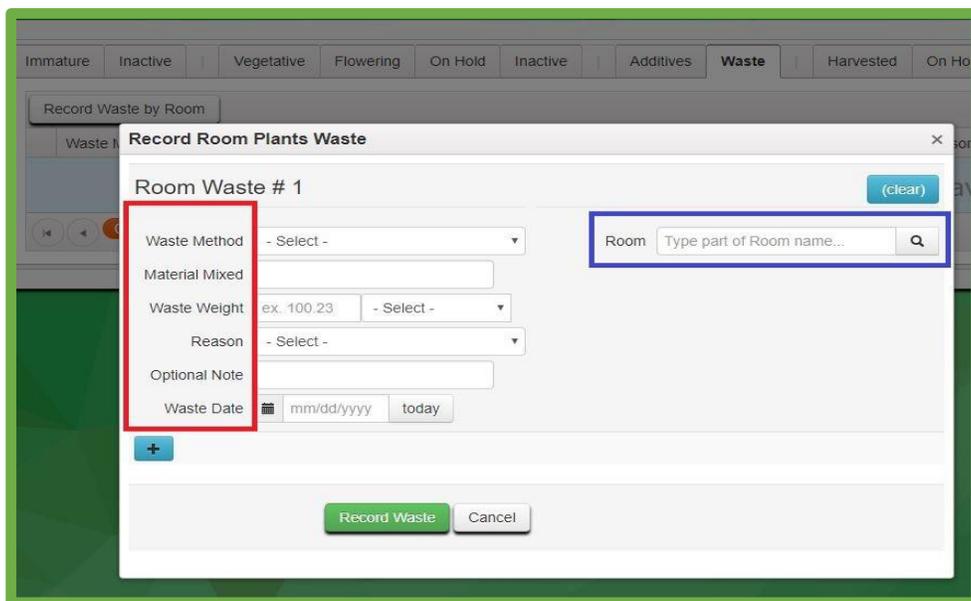


Figure 17: Record Waste Weight, Method, Reason, Date, and Time (include note)

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)**
 - 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						Waste						Harvested						On Hold						Inactive					
Moisture Loss will only be shown on "Finished" Harvests in the Inactive tab after you have reported Waste and created your Packages																													
Wet Wgt.	Waste	Total Pkg'd	Pkg's	Moist. Loss																									
5,450.88 g	1,675.88 g	1,000 g	2	2,775 g																									
6,747.75 g	1,643.19 g	1,000 g	2	4,104.56 g																									
5,313.52 g	1,502.36 g	2,267.9619 g	1	1,543.1982 g																									
5,249.79 g	1,605.42 g	1,000 g	2	2,644.37 g																									
5,139.41 g	1,503.69 g	1,000 g	2	2,635.72 g																									
5,119.1 g	1,506.87 g	2,767.9619 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 g																									

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

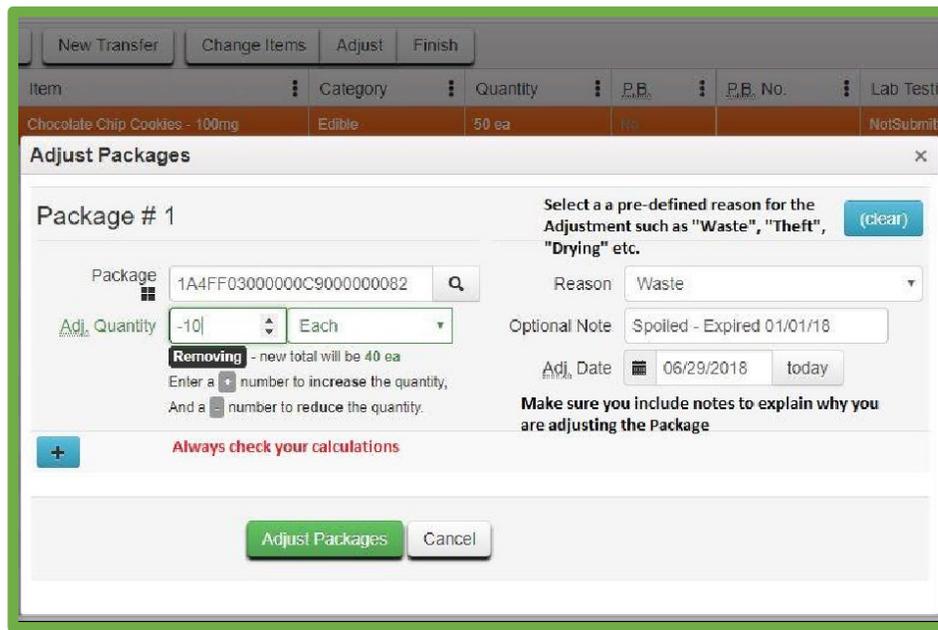


Figure 19: Package Adjustment for Waste



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:
<https://www.youtube.com/channel/UCcasu4orlpyqgEmQWWOkW0w>

Online classes available:

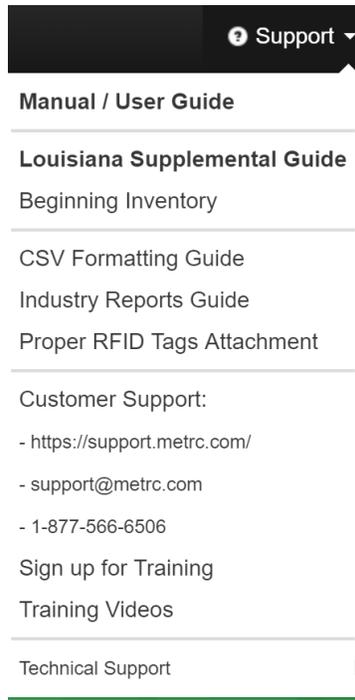
- Metrc New Business (Level 1) – All Facilities (due to the size of the program, these are made available periodically and if you would like to request a class, please contact Metrc support)
- Metrc Advanced (Level 2) (see above)
- Metrc Advanced Testing Facility Only (Level 2) – (Not available via scheduler)



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.



Please be advised that the new [CSV Formatting Guide](#) is now located under the Support Tab when logged into Metrc.

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

