# Montana - Metrc Support Bulletin

| Bulletin Number: MTIB#003 | Distribution Date: 08/10/18 | Effective Date: N/A |
|---|---|---|
| Contact Point: support@metrc.com | Subject(s): Beginning Inventory, Strains, Items, Tags, Waste | |
| Reason: Updates on guidance | | |

Greetings Metrc Users,

The purpose of this bulletin is to provide some additional guidance and clarification on multiple aspects of Metrc and the Montana Medical Cannabis Program.

## Metrc Tracking Requirements
## September 3rd, 2018

As a reminder to all Providers, it is the expectation of the DPHHS and the State of Montana that Providers are actively, and accurately, reporting the required information to the state in a timely fashion.

- All Providers currently credentialed into Metrc are expected to be actively reporting in Metrc as of September 3rd, 2018.
- All Providers who are licensed after September 3rd should be able to complete the setup process within two (2) weeks of the date they receive their credentials.
- This includes, but is not limited to:
  - Plant/Package tags ordered
  - Items, Strains, Employees, Patients entered
  - Beginning Inventory (All Plants/Packages created in Metrc and tagged physically)
  - Reporting ALL sales in Metrc within 24 hours
  - Reporting ALL Transfers in Metrc
  - Receiving ALL Transfers in Metrc within 24 hours of their arrival
  - Reporting ALL Home Deliveries in Metrc
  - Receiving ALL Home Deliveries in Metrc within 24 hours
  - Actively reporting ALL waste, theft, destruction of product, and required lab testing information
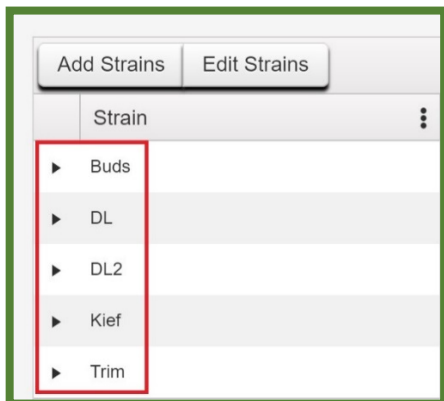
## Beginning Inventory

- Every Provider must perform a beginning inventory once they receive their credentials to log in to Metrc.
- Remember that some Providers will have multiple licenses (Dispensary, Cultivation, and MIP license types).
  **\*Every Provider must complete a beginning inventory for each license they own.**

# Strains

- **All strain names must be strain specific.**
- **DO NOT use generic names or acronyms , such as "Kief", "Trim", "Buds", "Sativa", "BD", etc.**

**INCORRECT**

| Add Strains | Edit Strains | |
|---|---|---|
| Strain | | ⋮ |
| ▶ | Buds | |
| ▶ | DL | |
| ▶ | DL2 | |
| ▶ | Kief | |
| ▶ | Trim | |

**CORRECT**

| | |
|---|---|
| ▶ | AK-47 |
| ▶ | Awesome High |
| ▶ | Blue Dream |
| ▶ | Chewbacca |
| ▶ | Colt 45 |
| ▶ | Crazy High |
| ▶ | Danky Kong |
| ▶ | Diesel Robber |

# Items

- **All Item names in Metrc must be Item and Strain specific**
- **DO NOT use generic names for Items, such as "Buds", "Strain", "Flower"**

| | | | | |
|---|---|---|---|---|
| ▶ | 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 |

*\*This may not apply to Infused Products (Items created from a recipe which may incorporate more than one strain of Cannabis in the infusion or extraction process and will therefore **not** result in a strain specific Item)*

# Micro-Grows & New Item Categories

Users in the State of Montana will now see new Item Categories available as they create their Items. These new Item Categories are available to all users when creating Items but are intended **ONLY** for Micro-Grows and may only be used by Providers who qualify as a Micro-Grow.

- **What is a "Micro-Grow"?**
  - A Micro-Grow is a term for Providers who have 10 or fewer Patients.
  - Once a Provider surpasses this threshold and is supporting 11 Patients or more, they may no longer be classified as a Micro-Grow
- **If you ARE a Micro-Grow:**
  - Notify the state via email that you classify as a Micro-Grow
  - Ensure that your Patients are registered in Metrc
    - Remember: Patients are registered under the *Dispensary* license
  - Ensure that your Items have all been created with the correct Item Category
- **If you are NOT a Micro-Grow:**
  - Do NOT use any Item Categories that are designated for Micro-Grows

**The new Item Categories are clearly marked (Micro-Grow) to make them easy to identify**

| Item Category | Type |
|---|---|
| ▶ Buds | Buds |
| ▶ Buds (Micro-Grow) | Buds |
| ▶ Concentrate | Concentrate |
| ▶ Concentrate (Micro-Grow) | Concentrate |
| ▶ Immature Plants | Plants |
| ▶ Infiused (edible) (Micro-Grow) | InfusedEdible |
| ▶ Infused (edible) | InfusedEdible |

# Tagging Plants & Packages

We have received questions from Providers about tags and have found that many licensees were tagging product incorrectly, and in some cases were doing more work than is necessary. Please review the sections below about tagging, refer to trainings and support materials, and reach out to the Metrc Support Team if you need additional guidance.
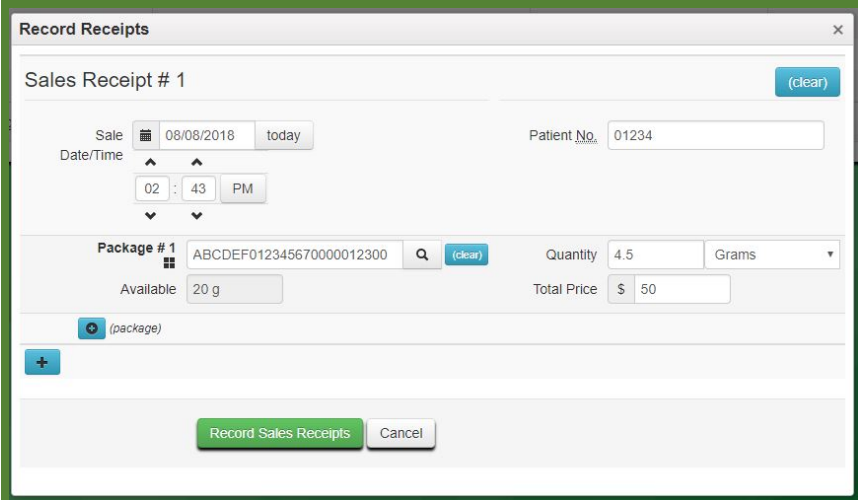
## Tagging Packages & pre-packaged product

- Remember that your Packages in Metrc are intended to track product by the Package/Lot/Batch, not by individual items.
- Packages of buds and shake/trim may be packaged by gross weight in Metrc.
- You may create multiple line items in your Point-of-Sale (POS) that can be associated with a single Metrc Item and a single Metrc package tag.

<span style="color:green">**In Metrc**</span> **- Create a single bulk package of product**

| | | | |
|---|---|---|---|
| ▶ Q ▦ ABCDEF012345670000012300 | Buds - Golden Goat | Buds | 20 g |
| ▶ Q ▦ ABCDEF012345670000012314 | Buds - Joe's Secret | Buds | 14 oz |

**In the Point-of-Sale (POS)** – **You may create multiple line items of pre-packaged product for each Strain**
1. You may designate the amount of marijuana product contained in each item that is being sold from the POS by entering the usable weight of marijuana contained within
    - *These fields are often labelled as "usable marijuana" or "usable weight"*
2. These items in the POS can share the same Metrc Package ID
    - **For Example: Multiple pre-packaged items under a single Metrc tag**
    - Golden Goat – 1g – 1 unit (1 gram of usable marijuana) – **Package 2300**
    - Golden Goat – 1/8$^{th}$ – 1 unit (3.5 grams of usable marijuana) – **Package 2300**
    - Golden Goat – 1/4$^{th}$ – 1 unit (7 grams of usable marijuana) – **Package 2300**
3. Each time one of these items is sold from the POS, the sale will be reported to Metrc by gross weight sold under a single Package (in a single transaction)
    - **For Example: A customer buys two different pre-packaged items: a gram and an eighth**
    - Golden Goat – 1/8$^{th}$ – 1 unit sold (3.5 grams) – **Package 2300**
    - Golden Goat – 1g – 1 unit sold (1 gram) – **Package 2300**
        - In Metrc, this sale will then be reported as 4.5 grams sold from package 2300

- The processes, functionality and terminology in each POS system will vary and may affect your success and accuracy if set up incorrectly.
- Please confer with your POS provider for instructions on how to perform this setup in your POS.
- This process may not work for everyone but will allow those facilities who have Medical tags to still use them.

## Tagging Plants

<span style="color:red">All plants must be physically and digitally assigned a plant RFID tag once they reach 8 inches tall</span>



- Plant Tag Attachment:
  - Loop the plant tag strap through a single notch on one end of the plant tag
  - Wrap the tag around the trunk of the plant above the first branch
  - Lock it in place so that the plant tag hangs down next to the trunk
    - *Attaching tags this way will improve visibility and utility of the bar codes*
  - The plant tags should be visible and reachable
    - Do not leave the tags in the soil, in dense foliage, or hanging over the sides of containers

# Phasing Plants

- **Plants may not skip phases**
  - You may not move a plant from immature to flowering without first moving it through the Vegetative Phase
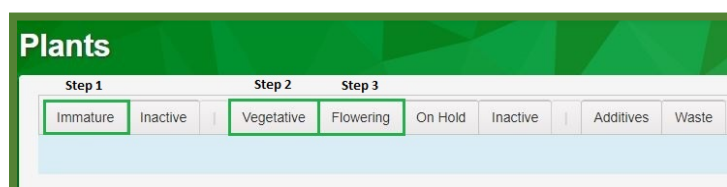
# Waste & Destroyed Plants

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
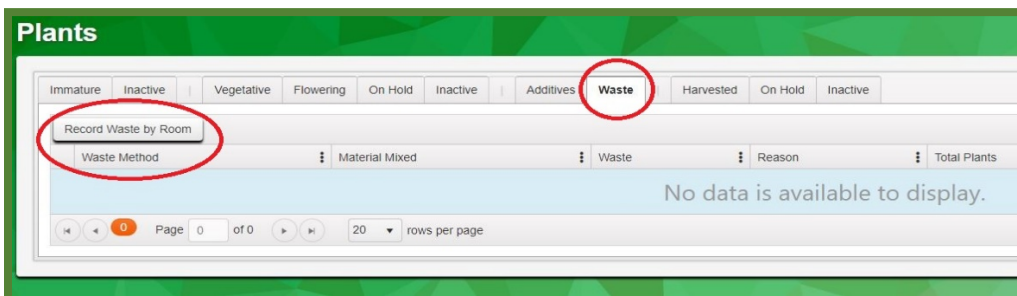
## Pre-Harvest Waste

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.

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

1. Pre-Harvest waste does not have to be recorded strain specifically
2. Pre-Harvest waste may be recorded in bulk and account for multiple strains (by Room)
3. You must select a "Waste Method" and "Waste Reason" when reporting waste in the waste log:
   - **Waste Methods:**
     - *Grinding with compostable Material*
     - *Grinding with non-compostable material*
     - *Other method approved by the Department*
   - **Waste Reasons:**
     - *Pruning*

**You can record pre-harvest plant waste by Room**

**You can also record pre-harvest plant waste by individual plants or groups**



**Record the waste weight, method, reason, date & time (include a brief description in the notes)**

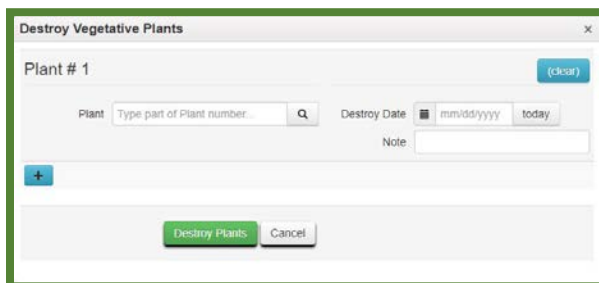## Destroyed Plants

If you are destroying an entire plant, you should still report the weight of the plant material as waste and *then* report that the entire plant was destroyed.

- First, remove the tag from the plant.
- Next, physically remove the plant from its pot/plot and weigh the plant material.
  - *Each facility will have slightly different methods for the destruction of plants but the amount of plant material being destroyed and removed from the facility as waste should be recorded in Metrc as waste before mixing it with anything (soil, trash, etc.)*
- Once recorded, proceed with destruction (mix material for disposal or re-use plant material as mulch)
- Report the waste weight in the waste log
- AFTER reporting the weight in the waste log, *then* report the plant itself as destroyed

<span style="color:red">**Make sure you include any relevant notes (Pest Infestation, State Ordered Destruction, etc.)**</span>

## 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 together
- You may not guess, estimate, round or otherwise manipulate the data

**Moisture Loss**
- Moisture loss should not be reported as waste from the Harvest
- Moisture loss should remain in the Harvest Batch in Metrc when "Finished"
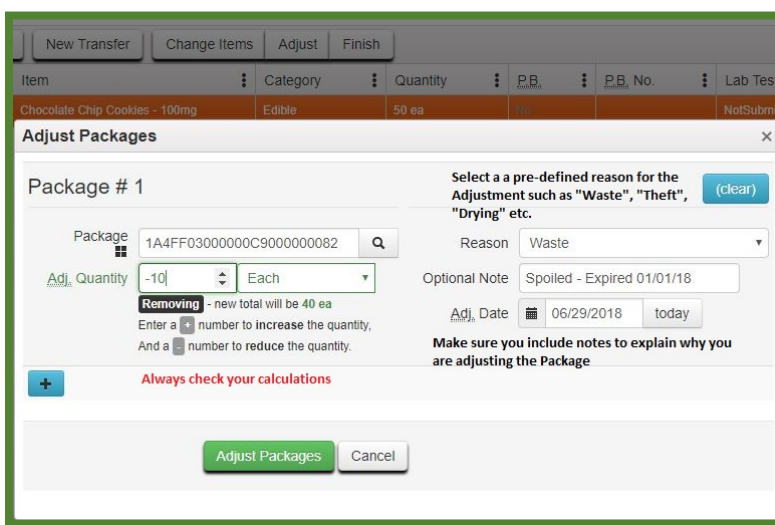- Moisture loss will then be shown in the "Moisture Loss" column under Inactive Harvests

| 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 |

## 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. 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
- Items that have spoiled/expired
- Residual waste from production methods or extractions

**Select the appropriate Package and then click "Adjust"**

# Metrc – Industry Training

Metrc provides industry training and education workshops in person and online. Support Guides and training videos are also available online 24/7x365.

- Register for workshops or classes online at: **www.metrc.com/montana**
- *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.*

**Online classes will be available starting in September:**
- Metrc New Business (Level 1) – All Facilities
- Metrc Advanced (Level 2) – Cultivators
- Metrc Advanced (Level 2) – Producers
- Metrc Advanced (Level 2) – Dispensaries
- Metrc Advanced (Level 2) – Testing Labs (Labs must submit request via email to Support)

# Metrc – Industry Support

Metrc provides live, interactive support for industry users and licensees. This information can be found on our website, or under the Support tab when logged into the software as pictured below.

**Check under the "Support" tab for additional resources**
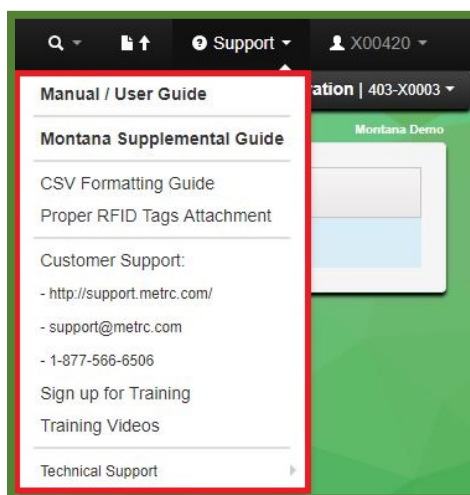


Please be advised that the new *CSV Formatting Guide* is now located under the Support Tab when you login to Metrc.

Please feel free to email support@metrc.com or call 877-566-6506 with any questions, or to request a copy of previous industry bulletins.