Metrc Support Bulletin

Bulletin No: LA_IB_0035	**Distribution Date**: 3/28/22	**Effective Date**: 3/21/22
Contact Point: Metrc® Support	**Subject**: Addition of New Item Categories	
Reason: Metrc is providing an update on the addition of the New Adjustment Reason: Trimming following new item categories; Buds (Bulk), Flower (Final Form), Shake/Trim (Bulk), Shake Trim (Final Form), Rosin (Final Form) and Pre-Rolls.		

Greetings Metrc Users,

On **March 23 ,2022,** the LDAF added a new Adjustment Reason "Trimming" as well several new item categories for use by the industry in Metrc. The item categories that have been added and explanation as to their designated use are as follows:

- Buds (Bulk)
- Kief (Final Form)
- Flower (Final Form)
- Shake/Trim (Bulk)
- Shake/Trim (Final Form)
- Pre-Roll
- Rosin (Final Form)

Bud (Bulk) is weight based and has no approval requirements upon creation. For more information see Metrc LA Bulletin 16.

Pre-Roll is a final form product requiring strain and weight. Pre-Rolls are created from flower at the manufacturing level. This will require product photo, label, and packaging photos for approval.

Flower (Final Form) item category requires strain, unit weight and description. The pre-form of Flower (Final Form) to be used is Buds (Bulk) category requiring strain and weight. Flower (Final Form) requires the item approval process.

Kief (Final Form) item category requires description and unit weight. Please note, this item is count based (each). This item is derived from the Concentrate category and requires the item approval process.

Rosin (Final Form) item category requires description, unit CBD content, unit THC content, and unit weight. It also requires the item approval.

Shake/Trim (Bulk) item category is weight based and has no requirements upon creation.

Shake/Trim (Final Form) item category requires strain, unit weight, and description. It also requires the item approval process.

Please use <u>grams</u> as your standard unit of measure when using Metrc.

** The Bulk item category is not to be used for any final products that are for transfer and sale to the pharmacy. Those products that are identified in the system containing Final Form in the name i.e., Flower (Final Form), Shake/Trim (Final Form), including all Final Form categories require the item approval process.

Metrc Support Bulletin

If a bulk item is incorrectly used, please contact Metrc support for assistance in making this correction at *support@metrc.com or 877-566-6506*.

Creating (Bulk) Item Category

A Bulk item category has been added to allow for creating packages that are to be utilized during product manufacturing. Bulk Items are only to be used within Production licenses and **cannot** be transferred or sold to the pharmacy**.** Any packages of manufactured product that are transferred to the pharmacy or sold to a retailer must utilize a <u>non-bulk item</u> category with the required information namely the item categories with Final Form in the name.

For example, Flower is being pulled from the harvest then generating a production batch of a large amount of Buds (Bulk) being packaged. To do this, the item would need to be created for the <u>Buds (Bulk) category </u>An Item can be created by selecting Items in the Admin area drop down menu, then clicking the Add Items button in the Items grid. These steps are demonstrated in **Figures 1 and 2** below.
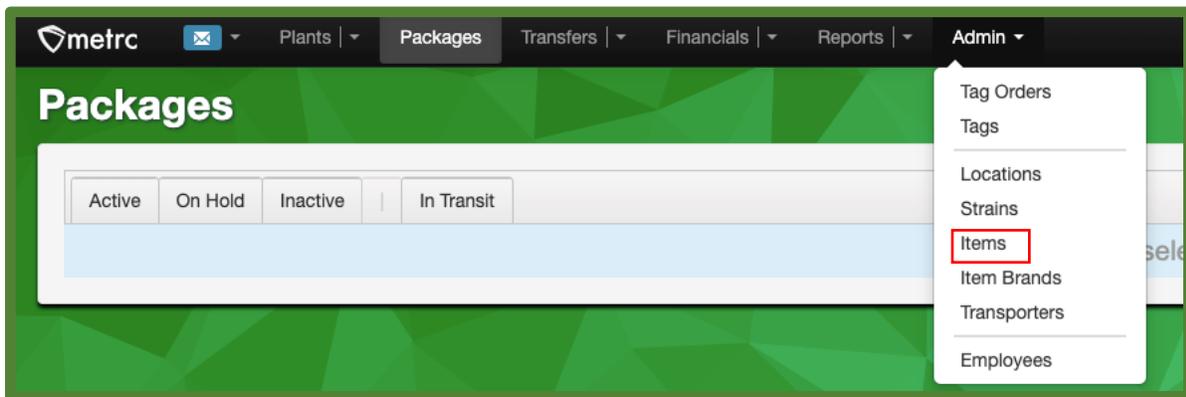
Figure 1: Adding Items
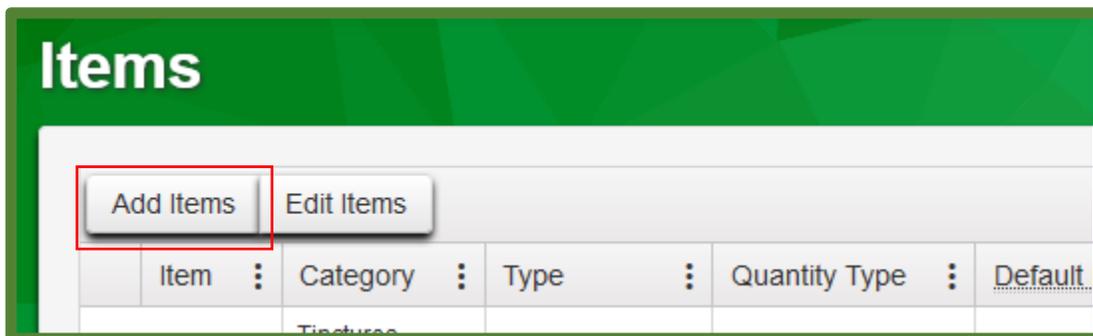
Figure 2: Adding Items Button

Metrc Support Bulletin

Once in the Add Items action window, add the information necessary. When creating an Item using a (Bulk) item category, the necessary information includes the Item Name, proper (Bulk) item category, Unit of Measure, Unit Weight, Description. No photos are required for Bulk item categories. See examples of creating (Bulk) item below in **Figures 3 and 4**.

Figure 3: Creating a Buds (Bulk) Item (no photos required)

Figure 4: Creating a Shake/Trim (Bulk) Item Category (no photos required)

Creating Final Form Item Category

When creating an Item using a (Final Form) item category, those items are created in the same action window as the (Bulk) item category. Once in the Add Items action window, add the required information necessary including the Item Name, proper (Final Form) item category, Unit of Measure, Unit Weight, Descriptions, Product Photo, Label Photo, and Packaging Photo. Keep in mind that (Final Form) item categories will be packaged in individual units for sale to the pharmacy. This is shown in **Figure 5**.

Figure 5: Create Kief (Final Form) Item (photos required). (Approval process Required)

Metrc Support Bulletin

Creating the (Bulk) Item Production Batch Package

Once the items have been created, a production batch package of the Buds (Bulk) item will need to be created from the harvest first. To accomplish this, go to the Plants area and select the Harvested tab. Select the harvest the Buds (Bulk) item is being packaged from, then select the Create Packages button to open an action window as shown in **Figure 6**. In the action window, the production batch package using the Buds (Bulk) item can be created. This process is demonstrated below in **Figure 7** below**.**
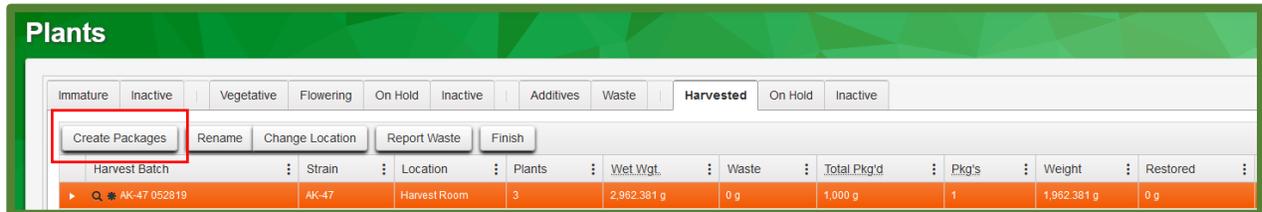

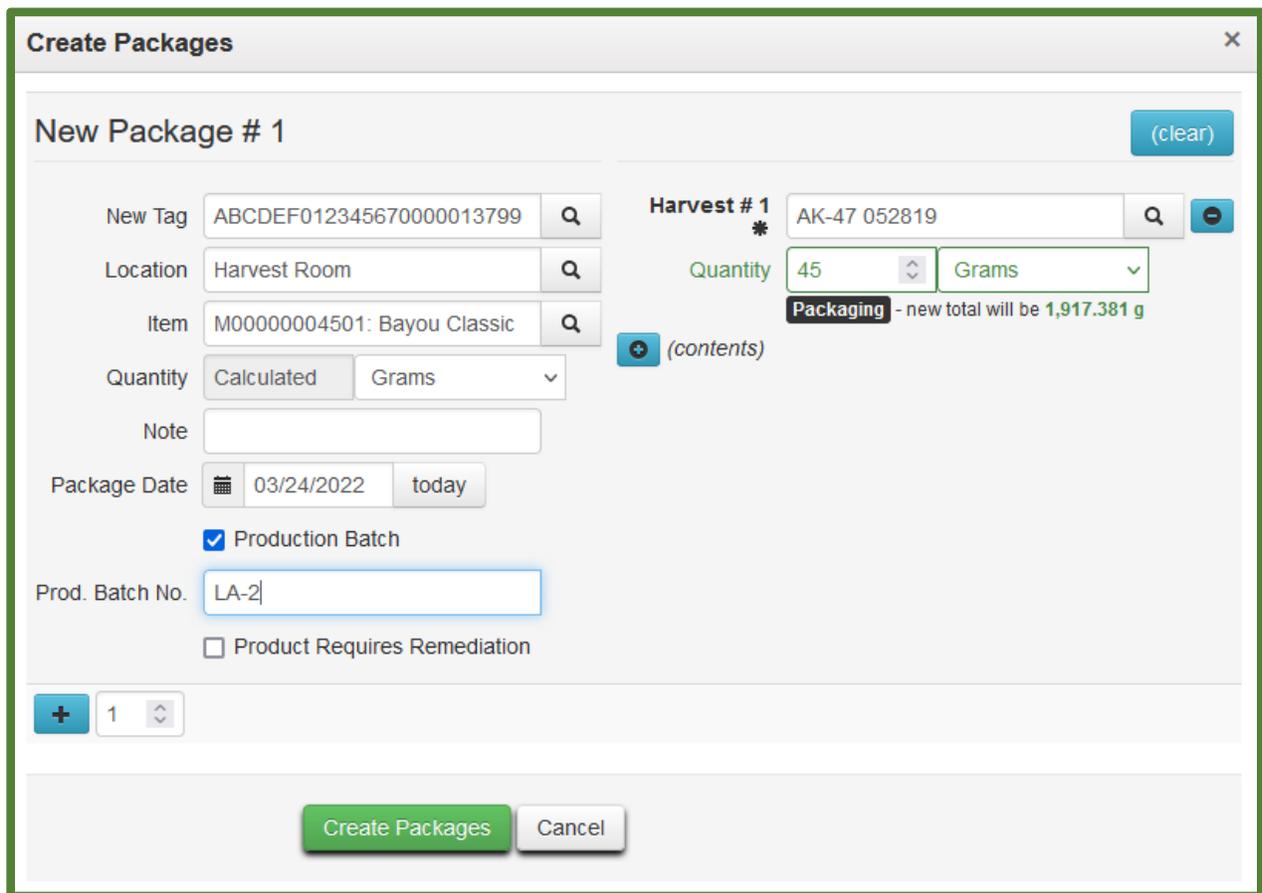**Figure 6: Selecting a Harvest to Create a Package**

Figure 7: Creating a Package from the Harvest

This same process should be followed for packaging all (Bulk) items including Kief (Bulk), Shake/Trim (Bulk), and Rosin (Bulk).

Creating (Final Form) Production Batch Package

Once the Buds (Bulk) package has been created, the production batch package of Flower (Final Form) item package can be created. To do this, go to the Packages grid and select the Buds (Bulk) package being pulled from and select the New Packages button as shown in **Figure 8**. This will open an action window to create the new production batch of the Flower (Final Form) item that was previously created. This process is demonstrated below in **Figure 9** below**.**
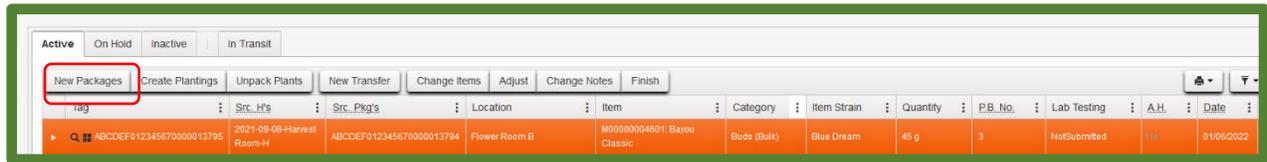

Figure 8: Select Buds (Bulk) Package and Select New Packages
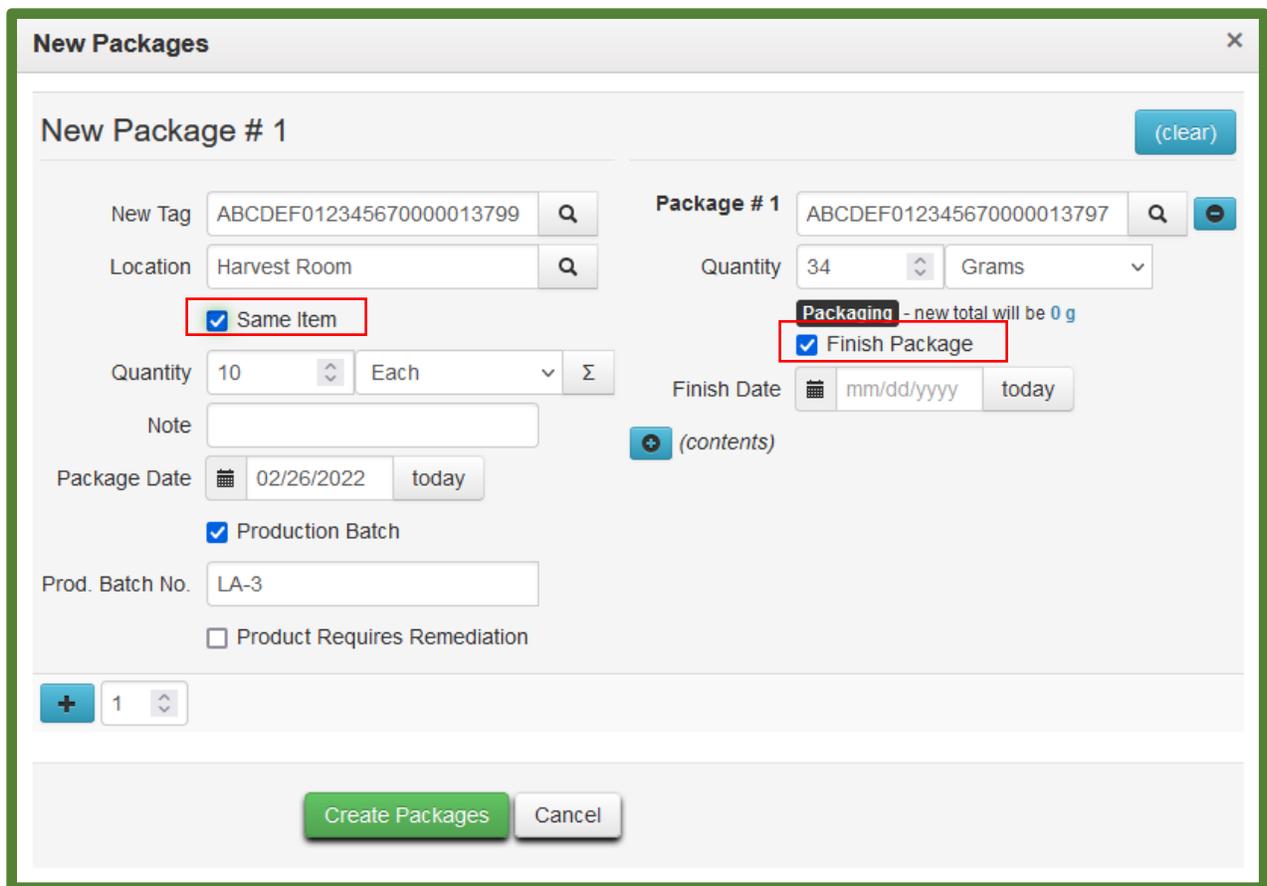

Figure 9: Creating a (Final Form) Production Batch while Using Same Item and Finishing Package

*** Please note, selecting **Finish Package** is a shortcut that tells Metrc that you are finished creating packages from the production batch and have exhausted your inventory, thus retiring it from use. It will appear grayed out in the packages grid. If errors occur, you can adjust the package. Also, selecting **Same Item** is a shortcut that tells Metrc that you are creating a*

*package using the same item name as the source package selected and don't need to use a new item. Both options are shown below in **Figure 5**.*

This same process can be followed for packaging all (Final Form) items including Kief (Final Form), Shake/Trim (Final Form), and Rosin (Final Form).

Trimming Adjustment Reason

A new Trimming package adjustment reason has been added to be used to explain a change in weight for trimming. Metrc calculates the new total, or the adjusted amount based on the data input. Note: The UoM (unit of measure) is restricted – you cannot change the current UoM by switching from grams to ounces and so on. If using the New Quantity box, the Unit of Measure will automatically reflect the same as the current package. However, if using the Adj. Quantity box, the UoM that must be selected must be consistent with the current UoM (weight-based – weight-based or count-based – count-based). The system will give an error notification if trying to use different units of measure. A package can still be finished in the Adjust Packages action window as well if the package is being emptied. This is demonstrated below in **Figures 19 and 20**.
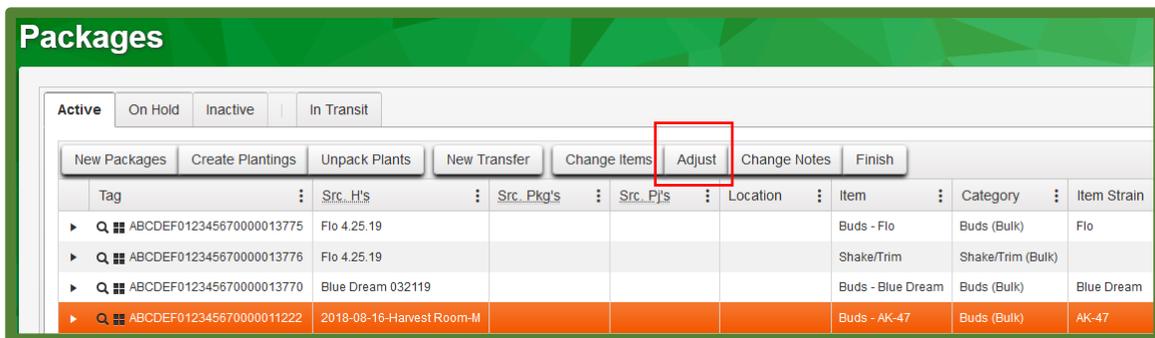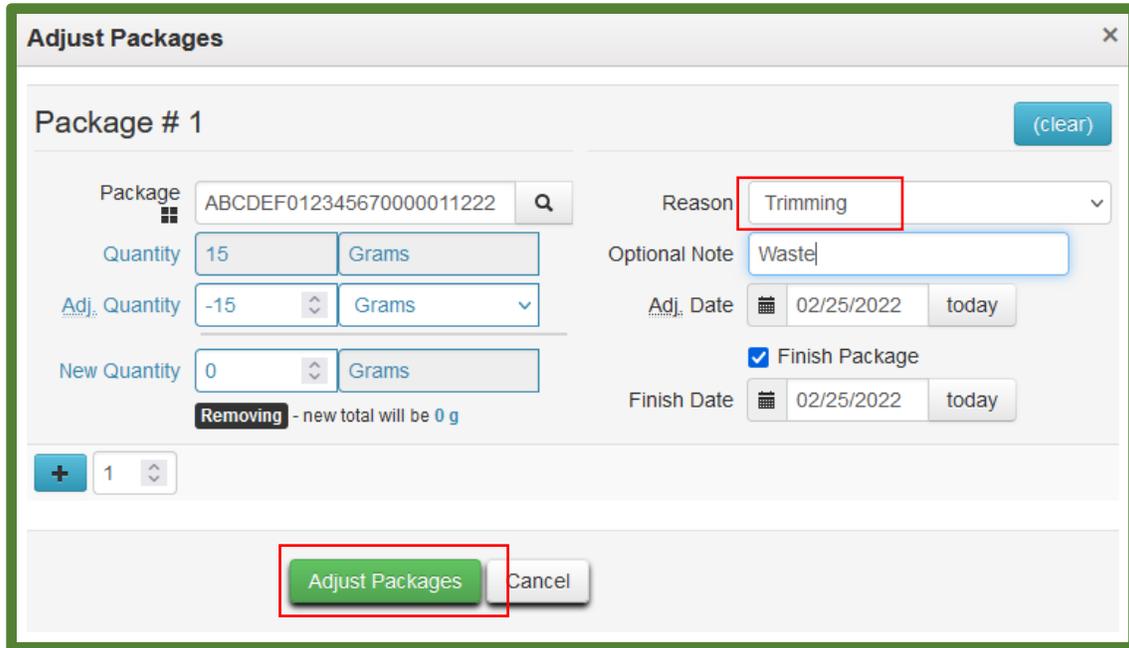

Figure 19: Select Package & Click Adjust Button

Figure 20: Trimming Adjustment Reason

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

For access to Metrc training and additional bulletins please follow the link here for more information.