### **Metrc Best Practices Bulletin**



Bulletin Number: CO_IB_11.11.22	Distribution Date: 11/11/2022	Effective Date: Ongoing					
Contact Point: Metrc® Support	<b>Subject</b> : Finishing Harvests and Packages, Finalizi Sales, Metrc Learn						
<b>Reason:</b> Metrc is providing emphasized guidance on the requirement to finish harvests and packages							

Greetings Metrc Users,

Metrc would like to provide guidance on how to best optimize the performance of the Metrc system for each of your licenses. Metrc consistently monitors system performance, as well as proactively identifies and addresses potential performance issues. However, there are specific steps each licensee can take to ensure Metrc is performing at optimal levels throughout the day. These steps include finishing harvests once they are completed, finishing packages once they become zero-quantity, and finalizing sales. These steps will help to speed up your processing time in the system, mitigate data errors that could be mistaken for non-compliance, and overall enhance the integrity of the Metrc system. All of these processes will be demonstrated within this bulletin. Also, included in this bulletin is the information for registering for a Metrc Learn account for all future and more in-depth training, which is a requirement for all Owners and Metrc Administrators, and is strongly suggested for all badged employees.

Please find on the following pages a detailed description of the enhancements:



# Finishing Harvests

Cultivation facility licensees must complete the harvest batch process following the steps outlined in the Metrc training and guide. Once all the unusable plant material is wasted out and all usable plant material is packaged (which moves it to the active packages inventory), the harvest must be finished.

Finishing a harvest not only removes it from the active harvest screen but will also indicate that any remaining weight left in the harvest is attributed to moisture loss.

To finish a harvest, navigate to the Harvested tab of the Plants Area and select a harvest(s) that has/have no more physical plant material remaining that has not been attributed to waste or a package in Metrc. Once selected, use the "Finish" button. This step is demonstrated in **Figure 1**, below.



Figure 1: Select Harvest Batch to Finish

This button will open an action window to indicate the Date Finished and then select the "Finish Harvests" button to complete the process. This step is demonstrated below in **Figure 2**.



Figure 2: Finish Harvest Batch Action Window

Once this step is completed, the harvest batch will be moved to the Inactive Harvests tab. Also, it can be noted that the remaining weight left in the harvest, after all physical plant material has been wasted or packaged, is now attributed to Moisture Loss. This example is shown below in **Figure 3**.

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Immature	Inactive		Vegetative	Flowering	On Ho	ld Inac	tive		Addi	tives Wa	aste	I	Harve	ested On	Hold	Inact	ive		
Harv	est Batch		:	Strain	:	Patient	:	Plants	:	Wet Wgt.	:	Waste	• :	Total Pkg'd	:	Pkg's	:	Moist. Loss	:
► Q.*	Metrc Test 7.1	.21		Metrc Test				2		1,000 g		500 g		200 g		1		300 g	

Figure 3: Finished Harvest Batch Example



# Finishing Zero-Quantity Packages

Any licensee with packages must ensure that all packages with zero-quantity are being finished. This moves these packages to the Inactive Package grid so that only packages with remaining quantities are visible in the active packages grid. This helps with overall performance in the system.

To identify packages that are zero-quantity or lower, navigate to the Packages grid by going to the Packages area on the long black navigational bar. Once there, click on the "Quantity" table header so all zero-quantity packages are listed first. By clicking once, the table will sort all packages in ascending order, by quantity, moving the smallest, or zero-quantity, packages to the top. Zero-quantity packages are also identified by the gray font.

Next, select one or several packages at a time to finish and use the "Finish" button to start the process. This step is demonstrated in **Figure 4**, below.

Active	On Hold Inactive	In Transit					
New Pac	kages Submit for Testir	g Remediate	Create Plantings	Unpack Plants	New Transfer		
Change	E Locations Change Iter	ns Change <u>Regio</u>	LTBs Adjust	Trade Sample -	Change Notes	Finish	
Tag	:	Src. H's	Location :	Item :	Category :	Item Strain	Quantity '
► Q II	1A4FF030000000100000356		Product Room				0 g
⊳ Q Ø	1A4FF0300000001000000299		Immature Plant Room	Immature Plant - Blue Dream	Immature Plants	Blue Dream	0 ea
► Q 👪	1A4FF0300000001000000226	2020-09-10-Harvest Room-H	Product Room	Buds - Maine Chocolate Bear	Buds/Flower	Maine Chocolate Bear	0 g
► Q 👪	1A4FF0300000001000000180		Grow Room A Row 5	Mature Plant - Skywalker Kush	Mature Plants	Skywalker Kush	0 lb
► Q <b>II</b>	1A4FF0300000001000000184		Flower Room A Row 1	JRG TEST	Mature Plants	Metrc Test	0 lb
⊳ Q <b>II</b>	1A4FF030000001000000176		Harvest Room	Mature Plant - Skywalker Kush	Mature Plants	Skywalker Kush	0 lb
⊦ Q <b>II</b>	1A4FF0300000001000000177		Immature Plant Room	Immature Plants - Skywalker Kush	Immature Plants	Skywalker Kush	0 ea
⊳ Q <b>II</b>	1A4FF0300000001000000167		Transfer Vault	Immature Plant - Jack Herrer	Immature Plants	Jack Herrer	0 ea
				Immature Plants -			

#### Figure 4: Select Zero-Quantity Package to Finish

This button will open an action window to indicate the Date Finished. Then use the "Finish Packages" button to complete the process, moving the package to the Inactive Packages tab. This step is demonstrated below in **Figure 5**.



Finish Packages ×									
Package 1A4FF030000001000000356 Date Finished 07/07/2021	today								
Finish Packages Cancel									

Figure 5: Finish Package Action Window



## **Sales Receipt Finalize and Unfinalize Buttons**

The Sales Receipt section of Metrc was previously updated to include two new buttons: Finalize and Unfinalize. A new Finalized column (filterable) has been added to the Sales Receipt grid as well.

								Comprehensive Dem
F	Record Receipts Edit Receipts	Finalize Unfinalize Import Dai	ly Sales (read-only)				ê	• =•
	Receipt :	Sales	Customer Type	Patient :	Packages	Total	Finalized	
•		08/15/2018 10:09 am	Consumer		1	\$1,000.00	Yes	Void
K	н • 1 Раде 1 of 1 » н 20 • rows per раде Vewing 1 - 1 (1 total) О							

Figure 6: New Finalized Sales Receipt Field

When a sales receipt is no longer active, select the receipt and click the Finalize button. The following window will appear. Verify the receipt number and click the "Finalize Sales Receipts" button. **Note:** A receipt should be considered "no longer active" once it becomes unlikely that it will need editing. Larger stores may want to Finalize older Sales Receipts at a faster pace (e.g., on a weekly basis to enhance the integrity of the data within the Metrc system and adhere to recording keeping rules). Finalizing sales prevents having system performance issues.

Finalize Receipts	×
Sales Receipt # 1	
Receipt 000000016	
Finalize Sales Receipts Cancel	

Figure 7: Finalize Sales Receipt Action Window

Finalizing sales receipts will remove the receipt from the list of active receipts Metrc pulls when you edit receipts, which will improve system performance. **Note:** *Only those receipts not marked as "finalized" will display in the edit receipts window.* 



## **Register for Metrc Learn**

Metrc Learn is designed to provide users with skills on the functionality available within Metrc. Users will learn how to use the system effectively, and then demonstrate their learning through interactive assessments. The functionality and topics are similar to the New Business and Advanced Metrc Trainings. Metrc Learn is organized into role-specific journeys that are made up of various modules; each module is focused on one function in Metrc. For example, the Cultivation journey might include different courses, such as "Creating an Immature Plant Batch," "Tracking Additives," "Reporting Waste," etc.

To access Metrc Learn, the user must register their account (link to <u>Metrc Learning</u> <u>Registration</u>). You can enter the required information. Once your registration information has been verified, you will be sent an email invitation to set your password by Metrc. If a user is working in multiple licenses, you should register for the program that reflects the area of the role you are looking to have training on first. This registration page is shown below in **Figure 8**.

124		
	First Name	
	Last Name	
	Email	
	State	
	Facility License Number	
	Metrc Username	
	Facility Type	
	CREATE ACCOUNT	

Figure 8: Metrc Learn Registration Page

**Please Note:** Users are encouraged to use an email they will have access to regardless of business association for their registration to ensure that any training transcripts are still accessible if email access is no longer available.

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