Metrc Support Bulletin

Bulletin Number: SD_IB_06	**Distribution Date**: 5/3/23	**Effective Date**: On-Going
Contact Point: Metrc® Support	**Subject**: Creating a Production Batch	
Reason: Providing guidance on creating Production Batches in Metrc		

Greetings Metrc Users,

The following is a step-by-step guide to creating Production Batches in Metrc. The document will show how a facility will correctly use the Production Batch indicator and walk through an example of correctly creating a Production Batch.

Going forward, **the Production Batch indicator should be used**

- **anytime a product changes form physically or chemically**
- **anytime a product changes category**
- **anytime multiple categories are combined, or**
- **anytime an additive, lipid, flavoring, or terpene is added to a product**

For example, if product goes:

- from flower into a concentrate or extract,
- shake/trim into a concentrate or extract,
- from a concentrate or extract into a vape cartridge,
- anytime non-marijuana ingredients are added to an already-created marijuana product, or
- from a concentrate or extract into an infused edible or an infused non-edible

then the Production Batch indicator should be used when creating that new package. Production Batches in Metrc should only be created <u>after</u> the actual yield is known.

Please see the following pages for more details on the process:

Production Batch Process

Step 1: Navigate to the Packages area of Metrc

Select the "Packages" area on the top navigational bar and once in the Packages grid, select the "Active" tab on the packages grid. This is shown in **Figure 1** below.
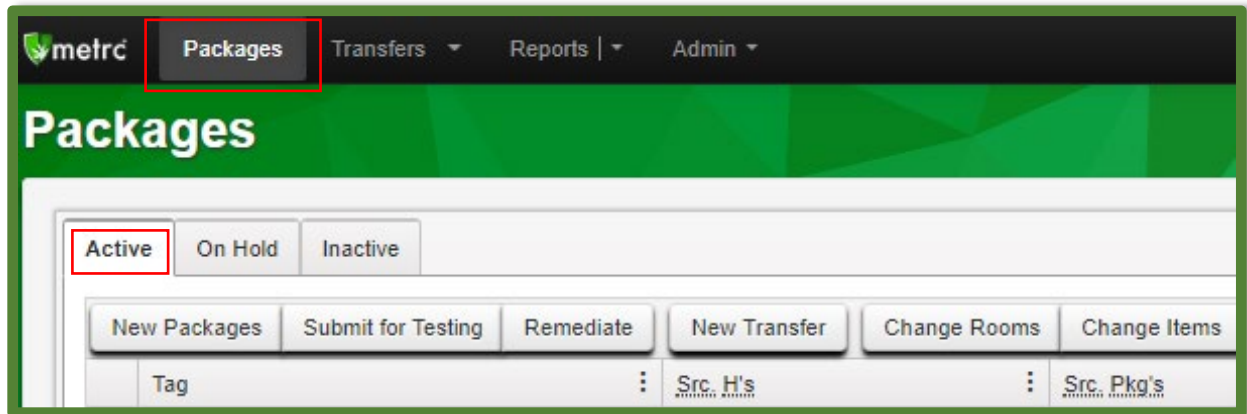

Figure 1: Navigate to Active Packages

Step 2: Identify packages to be used in the Production Batch

Select one or more packages intended to be used to create a Production Batch package. These package(s) will be combined to form one new Production Batch package. After highlighting the packages, select the "New Packages" button. This will prompt an action window to create the Production Batch. In this example, we are combining four shake/trim packages to create a concentrate Production Batch process. This step is demonstrated below in **Figure 2**.
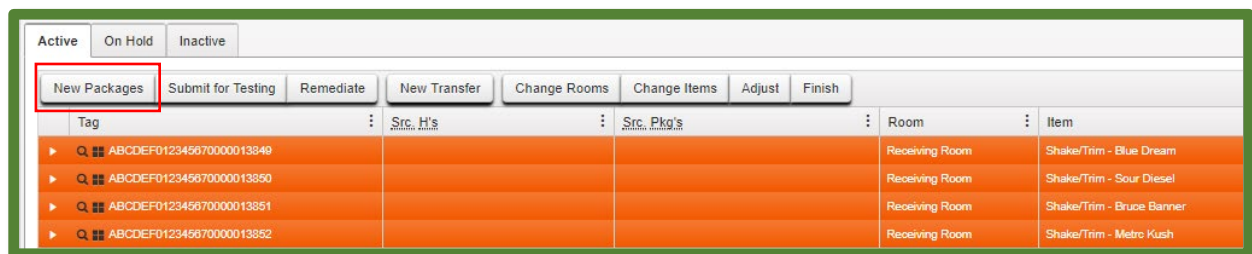

Figure 2: Select Source Package(s) for Production Batch

Step 3: Create the Production Batch Package

After using the New Package button, an action window will open with all the selected package(s) populated on the right side of the window. Note, the amount of raw product being taken from each package is on the right side of the window.

Next, fill in the information about the created package (new tag, room (location), item, quantity, unit of measure, and package date). <u>Since the product is going through a process in which it is changing form, the "Production Batch" field **must be checked** to denote this process.</u> At this time, the "Production Batch No." field will become available to utilize to enter the Production Batch number.

Please Note: the "Production Batch No." field is to input a unique identification system for Production Batches. The last five digits of the new package tag ID # can be used in place of the Production Batch number. This field is required.

After all the information has been entered and checked for accuracy, select the "Create Package" button. This step is demonstrated in **Figure 3** below.
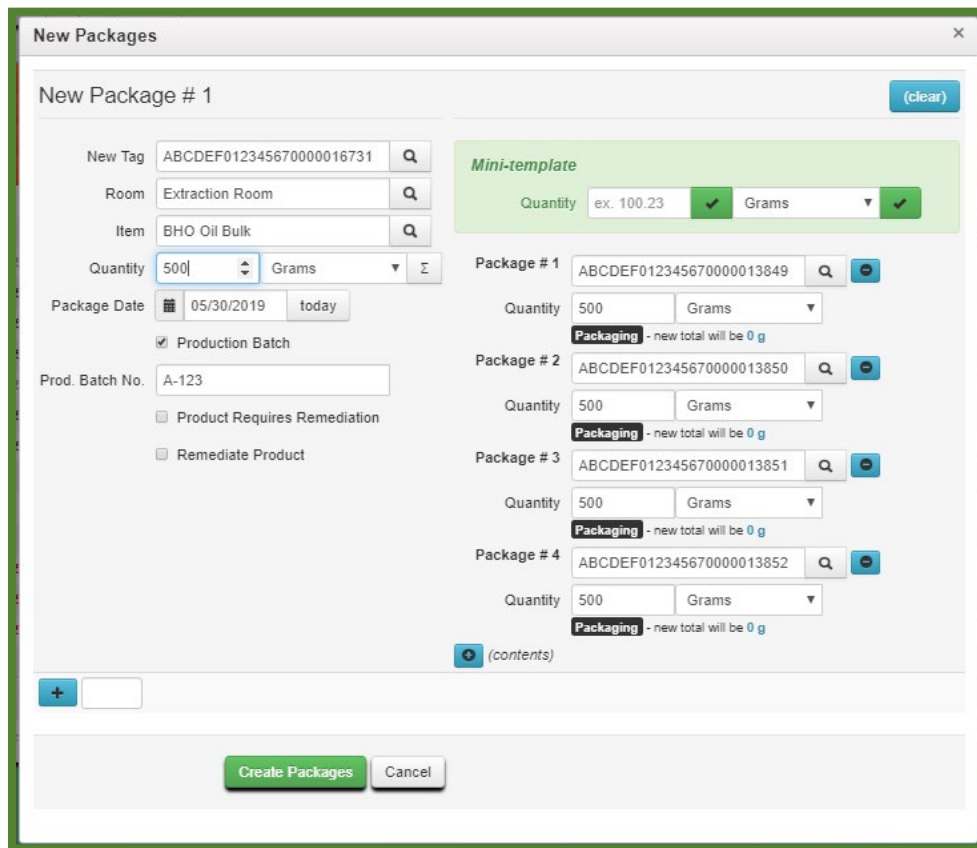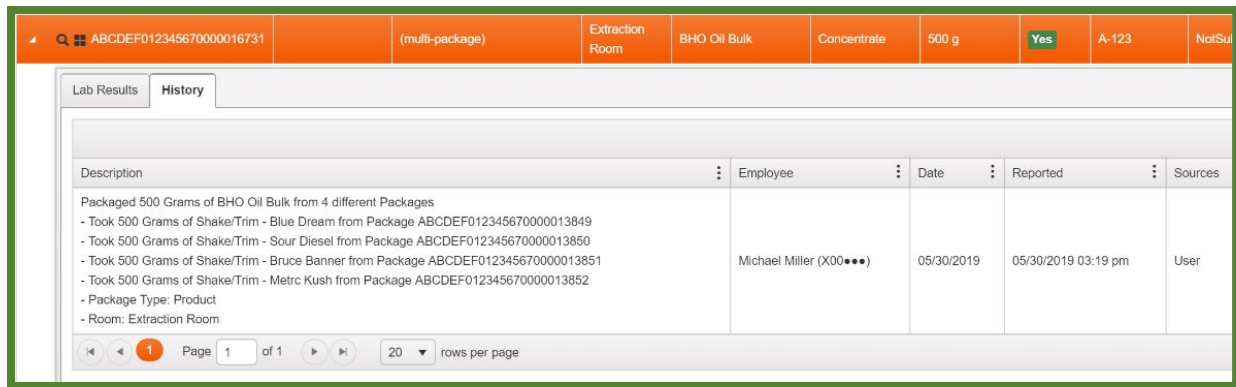

Figure 3: Create Production Batch Package from Multiple Packages

Step 4: Verify that the new package has been created correctly

Next, verify that the new bulk Production Batch package has been created and the weights of the source packages were correct using the package history. This is shown below in **Figure 4**. If an error was made in creating the Production Batch package, the new package should be discontinued and the weight or count will be returned to the source package(s) so that the Production Batch can be remade correctly.

Figure 4: Verify Production Batch Package History

Please Note: Once the Production Batch package is created, the Lab Testing status will be "NotSubmitted" and the lab results from the parent package(s) will not carry to the newly created Production Batch package. This is demonstrated in **Figure 5** and **Figure 6** below.

Figure 5: Production Batch Indicator Resets Lab Testing Status

Figure 6: Production Batch Indicator Severs Parent Package Test Results

Register for Metrc Learn – An Interactive Learning Management System

Metrc encourages all owners, managers, and employees that work with inventory to take our Metrc Learn training that is readily available to them. This helps with inventory control and proficiency in the software overall. Metrc Learn is designed to provide Metrc Users with skills on the functionality available within Metrc which they will need to use the system effectively. The New Business and facility-specific Advanced trainings are available through the Learning Library in Metrc Learn and the user can log into Metrc Learn to take the training on demand. The LMS is organized into facility-specific programs made up of various modules; each module is focused on one function in Metrc. For example, the Cultivator program might include different modules, such as "Creating an Immature Plant Batch" and "Reporting Waste".

Accessing Metrc Learn (the new LMS)

To access Metrc Learn, a User will self-register for their own account (Metrc Learning Registration). They will enter the information and click on the 'Create Account' button at the bottom of the page. Upon approval of active Metrc status, the user will be sent an email invitation to set their password. If a user is working in multiple licenses, they may enter all the licenses on the lines provided, and then select the license type that reflects the area of the role they are looking to have additional training on first. Other facility-type training can be added later. This registration page is shown below in **Figure 1**.
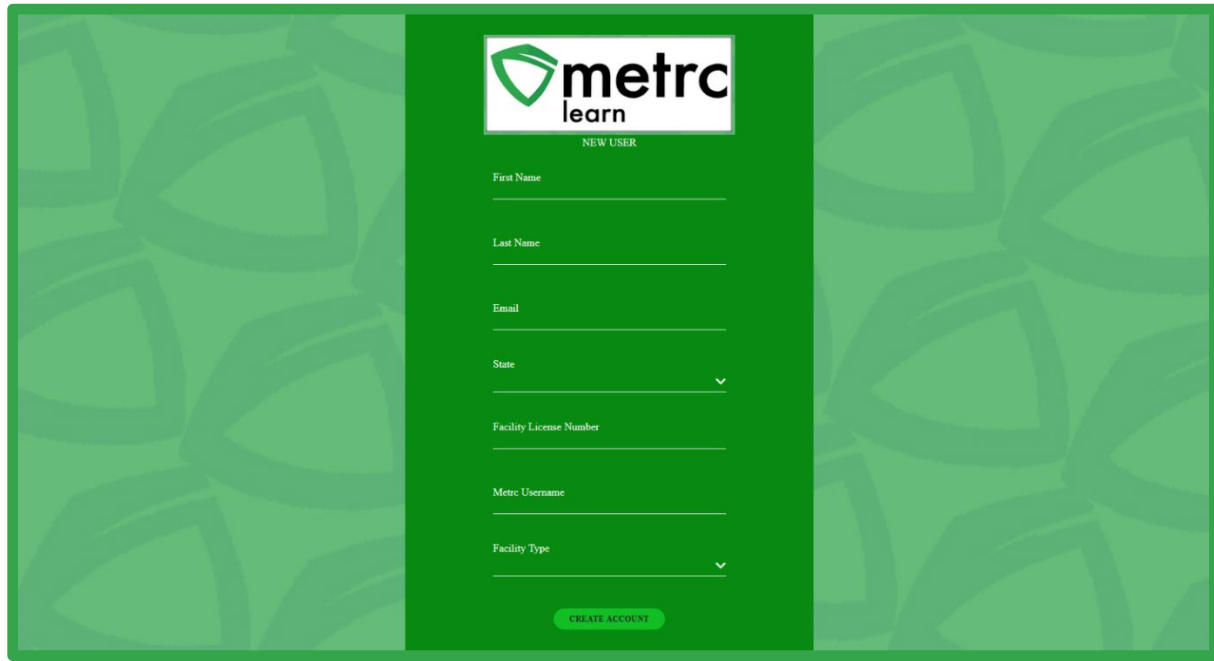
Figure 1: Metrc Learn Registration Page

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.*

Take the New Business or an Advanced Training through the Learning Library

Once a user has access to Metrc Learn they will be directed to the dashboard shown below and will select the 'Learning Library' tab available as shown below in **Figure 2.**
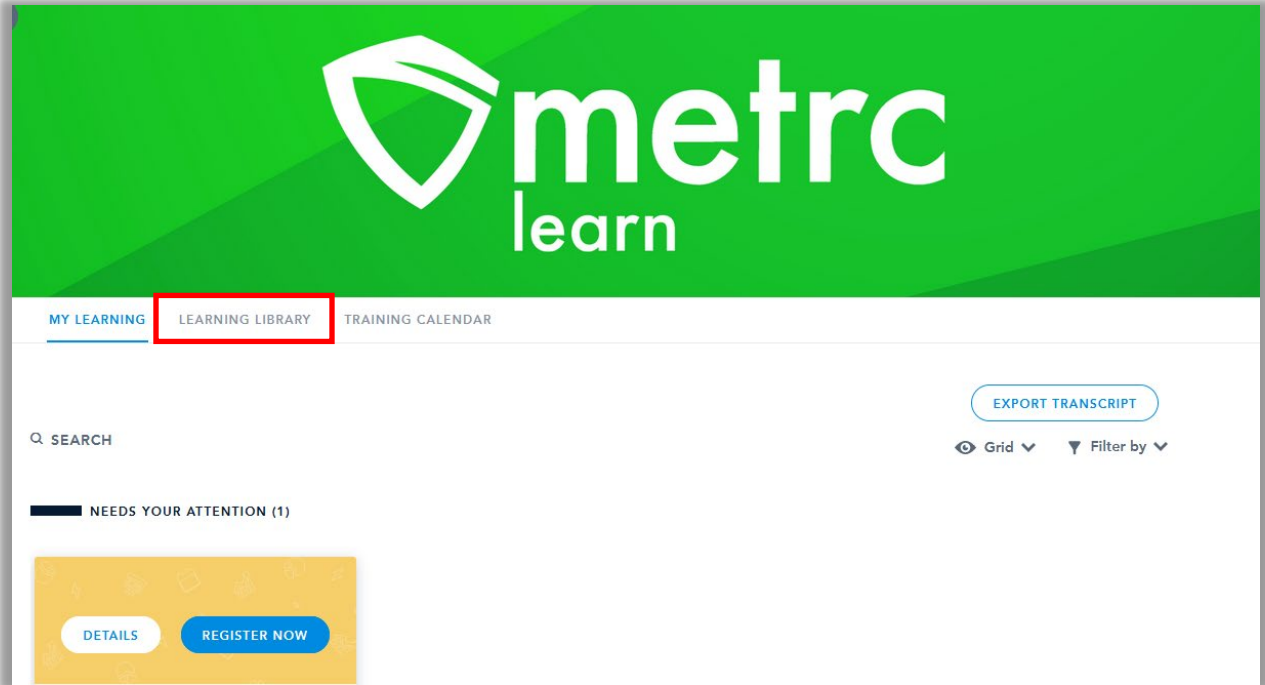
Figure 2: Metrc Learn Registration Dashboard

After selecting the "Learning Library" tab the learner will see content available to them including the New Business and Advanced trainings. They will choose the training they would like and click on the Enroll button to have it assigned to them as shown in **Figure 3.**
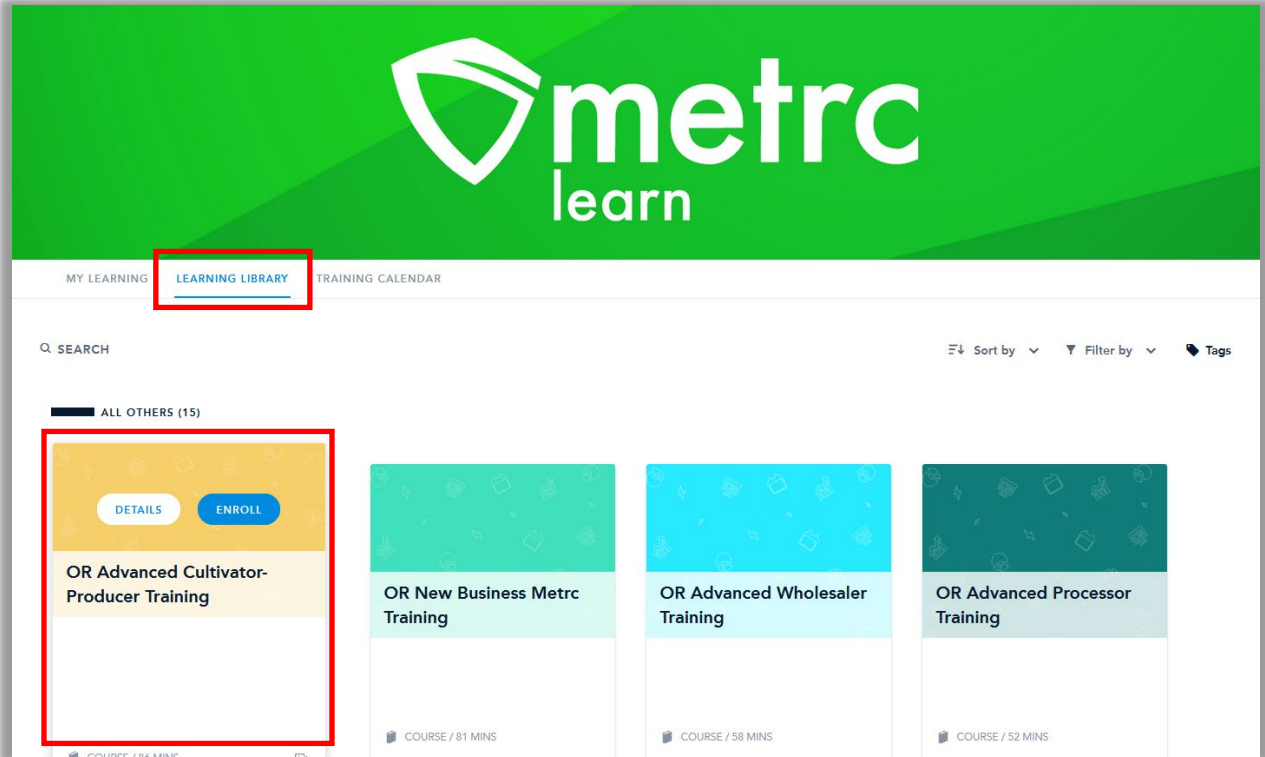
Figure 3: Enroll in the Training

After clicking 'Enroll' for the desired training, it will then be available for the user in the second, 'Added By You', row of their My Learning page. This is shown below in **Figure 4.**
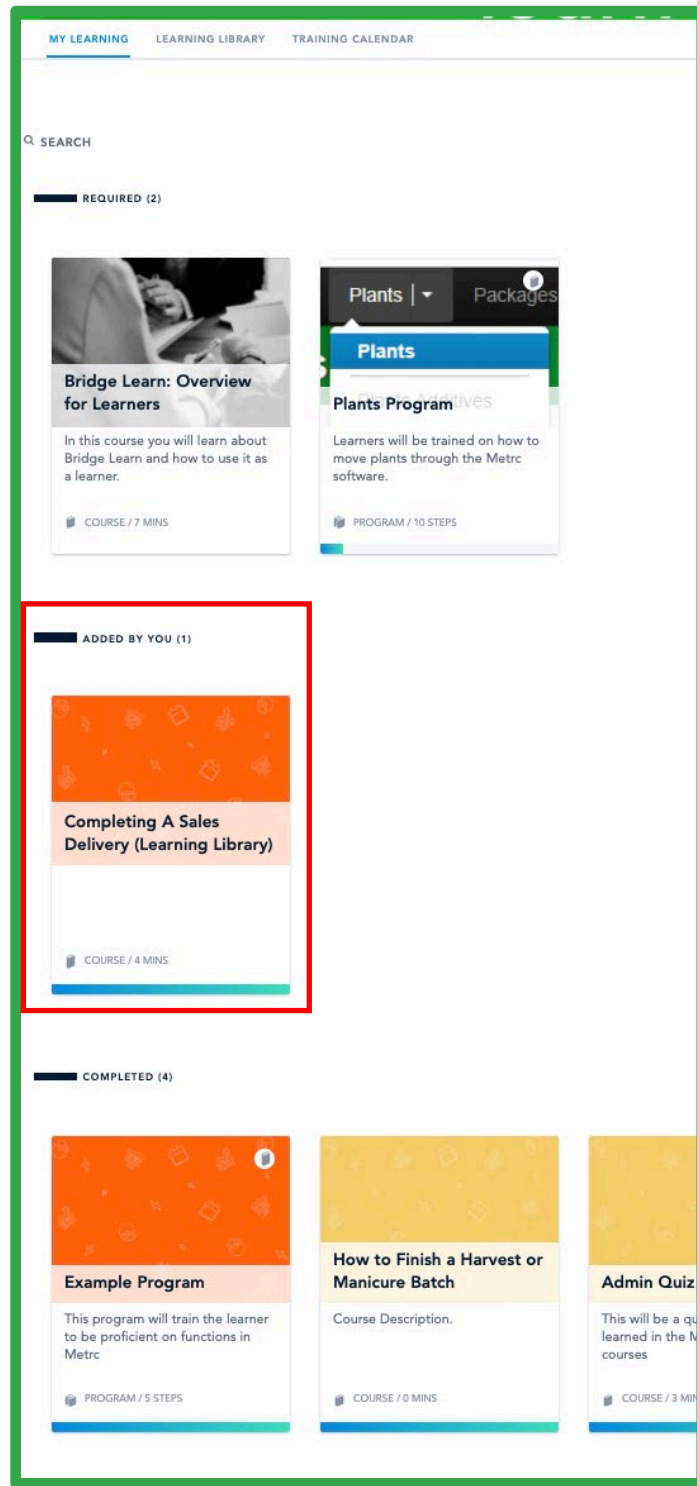
Figure 4: Trainings Added By You

Metrc Learn Facility-Specific Journeys

Metrc Learn has organized facility-specific journeys that are made up of three programs consisting of various self-paced courses with multiple modules; each module within a course is focused on one function in Metrc. For example, a Cultivator Program might include 15 courses, including "Creating an Immature Plant Batch," "Tracking Additives," "Reporting Waste," etc.

Metrc Learn offers facility-specific courses including—Cultivator, Manufacturer, Sales, Transporter, Testing, etc.

Module trainings are interactive and iterative to reinforce functionality and ensure knowledge retention. They include a demo and a hands-on component. The demo visually walks users through each step of the process and includes guidance via pop-up windows and voice narration. An example is shown below in **Figure 5**.
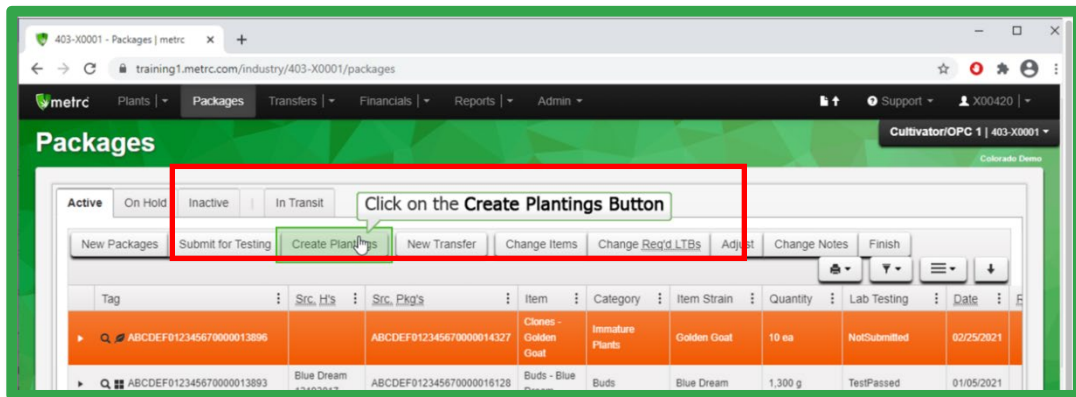

Figure 5: Demonstration Example

After viewing the demo, users do the hands-on component themselves. When going through the steps prompts and guidance will pop up if there are any errors. The user can then review the demo and/or do the hands-on component <u>as many times as the user would like</u>. This feature is shown below in **Figure 6**.
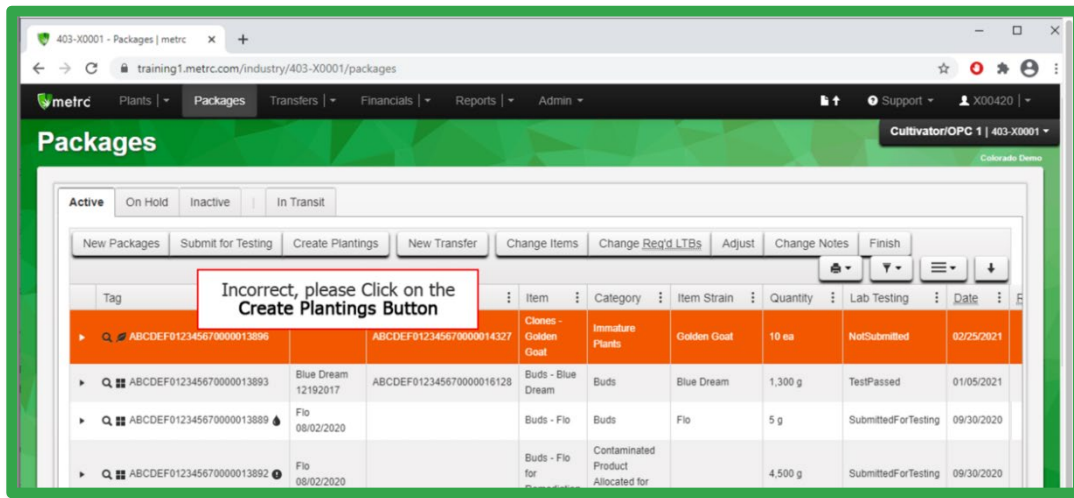
Figure 6: Interactive Demo Example

Users will be assigned facility-specific courses and can take each course at their own pace. This approach gives users the flexibility to learn about the system as well as the ability to see what courses are mandatory for their role. Once a user completes all modules in a course, they take a comprehensive quiz, which they must pass (scoring 70% or higher) before the program is considered complete.

Metrc Learn tracks and displays all completed coursework. Users will even have opportunities to receive certificates upon completion of a program. And those can be printed out to show a transcript of all their trainings for record keeping and ongoing training exercises.

Export Transcripts

Users will be able to export and share their achievements in the training portal by using the "Export Transcripts" button under their learning library. This feature is shown below in **Figure 4**.

Figure 4: Export Transcript Feature

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