

| Bulletin Number: RI_IB_0011 | Distribution Date: 6/9/23 | Effective Date: 6/9/2023 |
|--|--|---------------------------------------|
| Contact Point: Metrc [®] Support | Subject : Plants without a Inventory and Creating a F | Source, Beginning Production Batch |
| Reason: Providing guidance on Production Batches in Metrc | closing the Beginning Inver | tory window and creating |

Greetings Metrc Users,

Per the instruction of the Office of Cannabis Review (OCR), the ability to create an Opening Balance Plant Batch will be deactivated on 06/09/2023. Metrc would like to provide clarification on the deactivation of Opening Balance Plant Batches. The deactivation of Opening Balance Plant Batches means that all plant batches now must come from a source plant or package. The source plant must be either in the vegetative or flowering state in Metrc, or else the source package must be a seed or immature plant package.

After the deactivation of Opening Balance Plant Batches, licensees can request permission from the OCR to be granted the ability to create an Opening Balance Plant Batch. Requests must be sent to DBR.MMPCompliance@dbr.ri.gov.

In addition to the beginning inventory process, we've provided best practice guidance surrounding the use of creating Production Batches in Metrc.

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: © Metrc LLC, 2023



Creating a Plant Batch from a Source Plant

Since the plantings will no longer be able to be created in the immature plant page, the user must navigate to the vegetative or flowering plant tab to select the source or "mother" plant that the clone(s) will be taken from. Once selected the user will use the Create Plantings button to create the immature plant batch as seen in **Figure 1**.

| nmature | e On Hold | Inactive | Vegetative | Flowering | On Hold | Inactive | Additiv | es Waste | Harvested On | Hold Inactive | |
|---------|----------------|----------|-------------------|----------------|----------|---------------------|---------|------------------|--------------|-------------------|-----------|
| Assigr | n Tags Repla | ace Tags | Change Strains | Change Locatio | on Chang | ge Growth Phase | Char | nges by Location | Destroy Reco | rd Additives Reco | ord Waste |
| Crea | ate Plantings | Manicure | | | | | | | | | |
| Та | ıg | : | Strain : | Location : | Hold : | Group | : | Group Type | Group Date | Phase Date | Harvested |
| ► 1A4 | 4FF00000000650 | 00000016 | Providence Purple | Grow Room 24 | | Providence Purple | 6/28 | Seed | 06/28/2022 | 06/28/2022 | 0 times |
| ▶ 1A4 | 4FF00000000650 | 00000029 | Wind Farm OG | Grow Room 24 | No | Wind Farm OG 6/28 | В | Clone | 06/28/2022 | 06/28/2022 | 0 times |
| ► 1A4 | 4FF00000000650 | 00000030 | Wind Farm OG | Grow Room 24 | No | Wind Farm OG 6/28 | в | Clone | 06/28/2022 | 06/28/2022 | 1 time |
| ► 1A4 | 4FF00000000650 | 00000031 | Wind Farm OG | Veg Room 1 | No | Wind Farm OG 6/28 | З | Clone | 06/28/2022 | 06/28/2022 | 0 times |
| ► 1A4 | 4FF00000000650 | 00000048 | Little Rhody Kush | Veg Room 1 | No | Little Rhody Kush 9 | /26 | Clone | 09/26/2022 | 09/26/2022 | 0 times |

Figure 1: Select Source Plant

Next use the action window to create the immature plant batch, recording the number of plantings in the batch, strain, location, and planting date and select the "Create Plantings" button demonstrated in **Figure 2**.



| Create Plantin | gs from Vegetative Plants | | | | × |
|----------------|---------------------------|--------|---------------|--------------------------------|------------|
| Planting # 1 | | | | | (clear) |
| Plant | 1A4FF00000006500000016 | Q | Location | Type part of the Location name | e Q |
| Group Name | 1A4FF00000006500000016 | | Strain | Type part of the Strain name | Q |
| Plants Type | - Select - | ~ | Planting Date | mm/dd/yyyy | today |
| Plants Count | 0 | | | | |
| + 1 | | | | | |
| | Create Plantings | Cancel | | | |

Figure 2: Create Plantings Window

The user can now navigate to the immature plant tab shown in **Figure 3** under the Plants screen and verify that the planting(s) information is correct, including the "Source Plant" tag number.

| l Ir | nma | ature On Hold | Inactive | Vegetativ | e Flowe | ering On | Hold Inact | ive Ad | lditives Waste | e Harveste | ed On Hold | Inactive | | | |
|------|-----|-------------------|--|--------------|---------|----------|--------------|-----------|----------------|------------------|----------------|------------------|------------------------|--------------------|------------|
| | Cr | reate Plantings C | eate Plantings Create Packages Split Plantin | | | | Change Strai | ns Change | Location Cha | ange Growth Phas | e Destroy Plan | Record Additives | Record Waste | A- Y- | |
| | | Group | Strain : | Location : | Туре : | Hold : | Plants : | Tracked | Packaged | Harvested | Destroyed : | Source Package | Source Plant | Source Plant Batch | Group Date |
| | × | PP Batch 6/1/2023 | Providence Purple | Grow Room 24 | Clone | No | 10 | 0 | 0 | 0 | 0 | | 1A4FF00000006500000016 | | 06/01/2023 |
| | × | LR Kush 0103 | Little Rhody Kush | Mother Room | Clone | No | 8 | 0 | 0 | 140 | 2 | | | | 01/03/2023 |

Figure 3: Newly Created Immature Plant Batch



Creating Plant Batch from Source Package

An immature plant batch can also be created from a source package. This process can mean growing from a package of seeds or unpacking an immature plant package (clones). To do this, Select the source package and select the "Create Plantings" button as seen in **Figure 4**.

| Act | ive | On Hold | Inactive | 1 | In Transit | | | | | | | | | | | | | | | | | | |
|-----|-----|----------|------------------|------|------------|---------------------|------|-------------|---|----------------------|-----------------|-------------------|----|------------|------------|----------|------------|--------------|--------------|--------|------------|---------|---|
| N | lew | Packages | Submit for Test | ting | Remediate | Create Plantings | Ne | ew Transfer | | Change Locati | ions | Change Ite | ms | Change Re | egid L.T.B | Rs Adjus | st Change | Notes Finish | | e | -)[|][≡•] | 4 |
| | Та | ag | | : : | StcH's | Src. Pkg's | 1 | Src. Pj's | : | Location | ltem | 4 8 | C | Category : | Item S | Strain 🚦 | Quantity : | P.B. No. | Lab Testing | А.Н. : | Date : | Rox'd : | |
| | ٩ | 1A4FF01 | | | | | | | | Cultivation Vault | Wind Seeds | | | | | | | | | | | | × |
| × | Q | 1A4FF01 | 1000000650000000 | 07 | | 1A4FF01000006500000 | 0003 | | | Cultivation Vault | Provid Seeds | dence Purple s | s | Seeds | | | 25 ea | | NotSubmitted | No | 06/28/2022 | | × |

Figure 4: Create Planting Window

Then utilizing the action window in **Figure 5**, input all required information for the new immature plant batch. Once the information is correct and verified by the user, then select the "Create Plantings" button. This will create the immature plant batch under the "Immature" tab of the Plants Screen.

| Create Plantin | gs from Packages | | | | × |
|----------------|---------------------------------------|-------|---------------|--------------|---------|
| Planting # 1 | | | | | (clear) |
| Package | 1A4FF01000006500000008 | Q | Location | Grow Room 24 | Q |
| Quantity | 5 Each | ~ | Strain | Wind Farm OG | Q |
| | Unpackaging - new total will be 10 ea | | Planting Date | mm/dd/yyyy | today |
| Group Name | 1A4FF01000006500000008 | | Unpackage | mm/dd/yyyy | today |
| Plants Type | Seed | ~ | Date | | |
| Plants Count | 5 | | | | |
| + 1 | | | | | |
| | Create Plantings | Cance | el | | |



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The user can now navigate to the immature plant tab in the Plants screen in **Figure 6** and verify that the planting(s)s information is correct, including the "Source Plant" tag number.

| Imr | mature | On Hold | Inactive | | Vegeta | tive Flo | owering | On H | Hold | Inactive | | Additives | Waste | ŀ | Harvested | On | Hold | Inactive | | | | |
|-----|------------|-------------|-----------|--------------------|---------|------------|---------|------|--------|-----------|-----|---------------|----------|------|-----------|------|----------|----------|--------------------------|------------------------|--------------------|------------|
| | Create Pla | antings C | reate Pac | kages | Split P | Plantings | Renar | me | Change | e Strains | Ch | ange Location | Change | Grow | th Phase | Dest | roy Plan | ts R | ecord Additives Record V | Vaste | ▲• ▼• =• | + |
| | Group |) | : | Strain | : Lo | cation : | Туре | ÷ + | lold | Plants | - 1 | Tracked : | Packaged | : | Harvested | - : | Destroy | yed : | Source Package | Source Plant | Source Plant Batch | Group Dat |
| • | 1A4FF0 | 01000006500 | 0000008 | Wind Fai OG | rm Gro | ow Room 24 | Seed | N | lo | 5 | | 0 | 0 | | 0 | | 0 | | 1A4FF01000006500000008 | | | 06/01/2023 |
| • | PP Bat | ch 6/1/2023 | | Providen Purple | Gro | ow Room 24 | Clone | N | lo | 10 | | 0 | 0 | | 0 | | 0 | | | 1A4FF00000006500000016 | | 06/01/2023 |

Figure 6: Newly Created Immature Plant Batch



Production Batch Process

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.

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 6** below.

| metrc | Packages | Transfers 🝷 | Reports - | Admin - | | |
|--------|----------|--------------------|------------------------|--------------|--------------|--------------|
| Packa | iges | | S | | | |
| Active | On Hold | Inactive | | | | |
| New | Packages | Submit for Testing | g Remediate | New Transfer | Change Rooms | Change Items |
| 1 | Гаg | | : | Src. H's | : | Src. Pkg's |

Figure 6: 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 7**.

| New Packages Submit for Testing | Remediate | New Transfer | Change Rooms | Change Items | Adjust | Finish | | | | | | | |
|---------------------------------|-----------|--------------|--------------|--------------|--------|--------|------|--------------|--------------------------|------------------------|---|----------|--|
| | Kemediate | | | - | Aujust | Thingh | | | | | | | |
| Тад | : | Src. H's | : | Src. Pkg's | | | : Ro | om : | Item | Category | : | Quantity | |
| Q # ABCDEF012345670000013849 | | | | | | | | seiving Room | Shake/Trim - Blue Dream | Shake/Trim (by strain) | | | |
| Q # ABCDEF012345670000013850 | | | | | | | | eiving Room | Shake/Trim - Sour Diesel | Shake/Trim (by strain) | | | |
| | | | | | | | | | | | | | |

Figure 7: 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). 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. 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 8** below.

| New Packages | 3 | | | | | | | × |
|-----------------|--------------------------------|-----------------|------------|--------------|-----------------------|---------------------|-----|---------|
| New Packa | ge # 1 | | | | | | | (clear) |
| New Tag | ABCDEF0123 | 4567000001673 | 1 Q | Mini-templat | te | | | |
| Room | Extraction Roo BHO Oil Bulk | m | q | Quanti | ty ex. 100.23 | I Grams | | · • |
| Quantity | 500 | Grams | Ψ Σ | Package # 1 | ABCDEF012 | 345670000013849 | ۹ . | |
| Package Date | 65/30/201 | | | Quantity | 500 | Grams | Ŧ | |
| Prod. Batch No. | Production E A-123 | latch | | Package # 2 | 1 | 345670000013850 | ٩ | |
| | Product Req | uires Remediati | on | Quantity | 500 Packaging - ne | Grams | ٣ | |
| | Remediate F | Product | | Package # 3 | ABCDEF012 | 345670000013851 | ۹ | |
| | | | | Quantity | 500 Packaging - ne | Grams | ۳ | |
| | | | | Package # 4 | - | 345670000013852 | ۹ | |
| | | | | Quantity | 500 Rackaging | Grams | ٣ | |
| | | | | (contents) | Fackaging - In- | w total will be o g | | |
| + | | | | | | | | |
| | Cre | ate Packages | Cancel | | | | | |
| | - | | | | | | | |
| | | | | | | | | |

Figure 8: 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 9**. 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.

| ABCDEF012345670000016731 | | | Extraction Room | BHO Oil | Bulk | | | | | Yes A- | | | | | |
|---|---|--|--------------------|---------|---------------|-------------|-----|------------|------|---------------|----|---------|-----|--------------|----|
| Lab Results History | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | A- [| Ξ, |
| Description | | | | : | Employee | | : 0 | Date | Rep | oorted | : | Sources | : 1 | External App | |
| Packaged 500 Grams of BHO Oil Bull - Took 500 Grams of Shake/Trim - Blu - Took 500 Grams of Shake/Trim - So - Took 500 Grams of Shake/Trim - Bru Took 500 Grams of Shake/Trim - Bru | ue Dream from Pack ur Diesel from Pack uce Banner from Pa | age ABCDEF01234567000001384 age ABCDEF01234567000001385 | 50 3851 | | Michael Mille | er (X00•••) | 0 | 05/30/2019 | 05/3 | 30/2019 03:19 | pm | User | | | |

Figure 9: 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 10** and **Figure 11** below.

| īag 🚦 | Location : | Item | | : | Cate | gory : | <u>P.B.</u> | : La | b Test | ing |
|---|--|---------------------|----------------------------|------|--------|--------------------|-------------|----------------|---------|--------------|
| ABCDEF012345670000016115 | Manufacturing Room | M0000001601: Cherry | Tincture 50 mg THC | | Tinctu | ıres | Yes | No | tSubmit | tted |
| Lab Results History | | | | | | | | | | |
| Description | | : | Employee | Date | • | Reported | | ▼ ▼ Sources | - | External App |
| Packaged 600 Each of M0000001601: Ch - Took 100 Grams of M0000003901: Synth ABCDEF01234567000016114 - Took 200 Grams of M0000004001: Conc ABCDEF01234567000016117 - Took 5 Grams of M00000001701: Pure CE ABCDEF012345670000016102 - Package Type: Product - Location: Manufacturing Room - Location Type: default - Production Batch No: TNC-10001 | etic Terpenes from Package entrate - BHO Oil from Packa | | Charles Harris (X00∙••) | 10/1 | 2/2020 | 10/12/2020 0 pm | 1:19 | User | | |

Figure 10: Production Batch Indicator Resets Lab Testing Status



| ag | | | : | Location | | : | Item | | | | | 0 | ategory | ÷ | P.B. | : | Lab Tes | sting | |
|----------------------------|---------------|---------|-----|--------------------|---|-------------|---|---------|-----|-------|----|--------------|---------|--------|--------|--------------|---------|-------------|--------|
| # ABCDEF012345670000016115 | | | | Manufacturing Room | | | M00000001601: Cherry Tincture 50 mg THC | | | | | Tinctures | | | Yes | NotSubmitted | | | |
| Lab F | Results Histo | у | | | | | | | | | | | | | | (| | | |
| | Test Date | Overall | : т | est Name | : | Test Passed | a : | Result | : | Notes | : | Released Dat | te | : Samp | ole Pa | ckage | | ▼ ▼ Item | Catego |
| | | | | | | No | o dat | a is av | vai | lable | to | display. | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |

Figure 11: Production Batch Indicator Severs Parent Package Test Results

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