

Bulletin Number: MD_IB_0069	Distribution Date: 06/16/23	Effective Date: Ongoing
Contact Point: Metrc® Support	Subject: Item Categories, Remediation, Production Batches, Locations, Unit CBD & Unit THC Content, Immature Plant Batch Tagging, Patient Limit Information, Sales Fields, and Metrc Resources.	
Reason: Metrc is providing some updates and new implementations		

Greetings Metrc Users,

Metrc, in conjunction with the MCA, would like to provide information about updates and announce the addition of new item categories. This bulletin will show information regarding updated & new Item Categories, Remediation, Production Batch, Locations for Packages (including Dispensaries), Unit CBD & Unit THC Content, Tagging Immature Plant Batches, and Patient Limit information.

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Please find on the following page a detailed description of how to create an item:

Item Categories

The complete list of Item Categories per the MCA is as follows:

Buds

Concentrate (Each) (Medical Only)

Concentrate (Weight) (Medical Only)

Exempt Edible Products (Medical Only)

Exempt Liquid Edible Products (Medical Only)

Hemp (Final Form) Ingestible

Hemp (Final Form) Inhalable

Hemp Concentrate

Hemp Flower/Bud

Hemp Shake/Trim

Immature Plants – This category is for clones being transferred from cultivation to cultivation.

Infused Edible

Infused Edible (Capsule Only)

Infused Liquid Edible – This category is for single servings only.

Infused Non-Edible

Seedling - This category is to be used when transferring clones under 6 inches tall or wide to a dispensary to be sold.

Seeds

Shake/Trim

Shake/Trim (by strain)

Tincture for Oral Admin

Vape Cart

Waste – This category is for non-green waste.

Wet Whole Plant

Per the MCA, any product that is created or packaged after the implementation date of these categories must be properly categorized. Any current existing inventory that is packaged prior to the implementation date using an item category that is not in the above list will need to be repackaged or sold by January 1, 2024.

Creating a Package Using an Item Category

The MCA has created some new item categories that should be used moving forward. In order to create an item using an item category, the instructions are below.

Navigate to the Items grid by selecting the Items option under the Admin area on the navigational toolbar. This step is shown below in **Figure 1**.

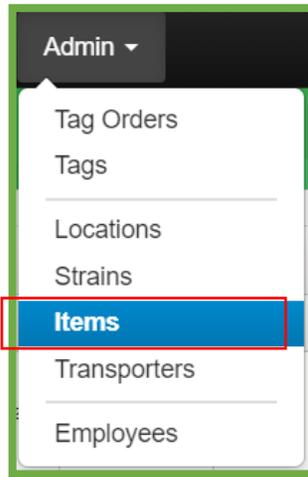


Figure 1: Admin Menu with Items Option

Please Note: If you do not see this option, you will need to be granted permission under the employee admin menu.

Once on the Items screen, utilize the “Add items” button to begin the process. This step is demonstrated below in **Figure 2**.

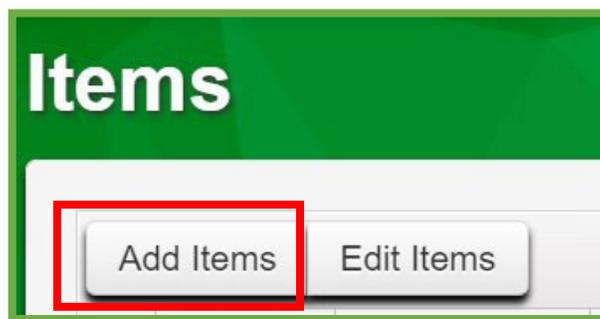


Figure 2: Add Items Button

This button will trigger the action window to create the item information utilizing the correct item category. Once the information is entered, use the green “Create Items” button to complete the process. This step is demonstrated below in **Figure 3**.

Figure 3: Add Infused Cannabis Plant Material Action Window

Once the item is created, navigate to the packages grid and select the package that is being repackaged or pulled from using the new item that was created using the new item category. Then select the “New Packages” button. This step is demonstrated in **Figure 4** below.

Tag	Src. H's	Location	Item	Category	Item Strain	Quantity
1A4FF0300000068000000210	OG Kush 2023 May	Product Vault	Kief	Kief		500 g
1A4FF0300000001000000485	OG Kush 2023 May	Product Vault	Buds - OG Kush	Buds/Flower	OG Kush	7,498 g

Figure 4: Select Strain-Specific Package

This button will trigger an action window to create a package. Then indicate the amount taken from the source package on the right-hand side and the new package information on the left side.

Please note that the production batch box should be selected if the new package is a production batch. A production batch number will then need to be assigned.

This step is demonstrated in **Figure 5**.

Figure 5: Create New Package Action Window

Remediating a Package in Metrc

To Remediate a package in Metrc, navigate to the active Packages grid by selecting the packages area on the navigational toolbar. Then select the Active tab in the Packages grid as shown in **Figure 6**.

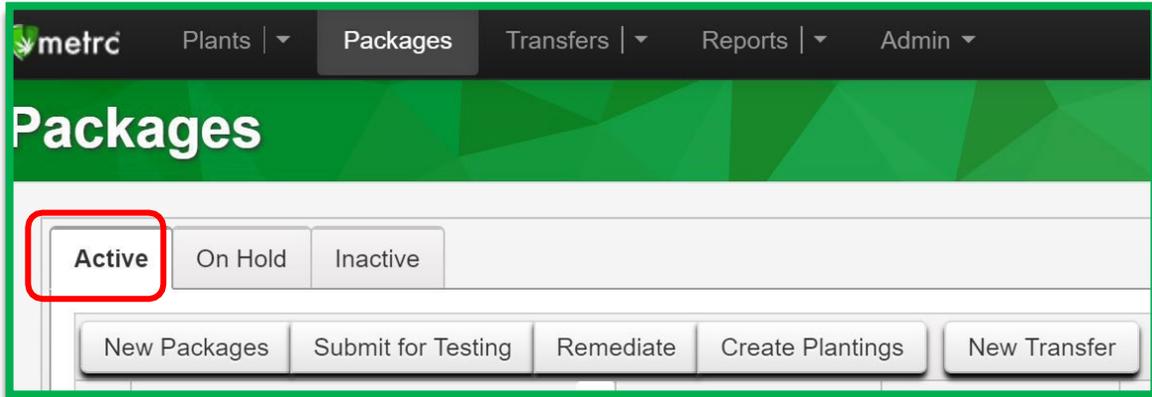


Figure 6: Navigation to Active Packages

Once in the active Packages grid, identify the package(s) with a “TestFailed” Lab Testing status that is/are being remediated. It is important to understand the reason the product failed testing and the appropriate method for remediation. In **Figure 7**, two packages are shown: a package of buds that failed for water activity and a package of shake/trim that failed for microbials. Both can be remediated but will have to use different methods to do so.

Active											
On Hold											
Inactive											
New Packages											
Submit for Testing											
Remediate											
Create Plantings											
New Transfer											
Change Rooms											
Change Items											
Adjust											
Finish											
Tag	Src. H's	Src. Pkg's	Room	Item	Category	Item Strain	Quantity	P.B.	P.B. No.	Lab Testing	
▶ ABCDEF012345670000015180	Metrc Bliss 6/13/2019		Processing Room	Buds - Metrc Bliss	Buds	Metrc Bliss	397 g	No		TestFailed	
▶ ABCDEF012345670000015181	Metrc Bliss 6/13/2019		Processing Room	Shake/Trim - Metrc Bliss	Shake/Trim (by strain)	Metrc Bliss	477 g	No		TestFailed	

Figure 7: Two Testing Failed Package Examples

In the above examples, the remediation methods are as follows: For the buds that failed for water activity the action required is Additional Drying and Curing, and for the shake/trim that failed for microbials a processor would need to use for extraction.



Figure 8: Remediation Methods

In the bud package example, the product would continue to be dried and record the package adjustment for the additional drying by selecting the package and using the “Adjust” button as shown in **Figure 9**.

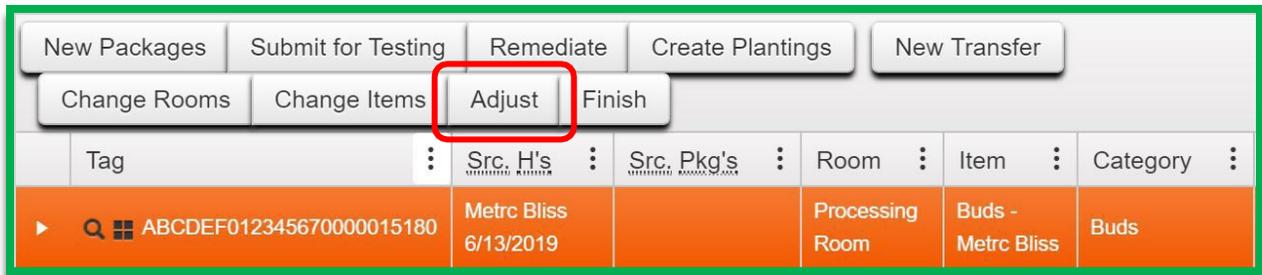


Figure 9: Select Buds Package and Adjust Button

After the action window appears, record the loss of weight due to drying and include a note for clarification of why the package is being adjusted. Then click the “Adjust Packages” button when all the information has been verified as correct as seen in **Figure 10** below.

Figure 10: Adjust Package Weight for Moisture Loss

**Please Note: Only record a weight change to the amount in the package that reflects an accurate representation for what physically transpired.*

After the necessary drying has been completed and recorded in Metrc, the product can now be remediated by selecting the Buds package and then clicking the “Remediate” button as seen in **Figure 11**. This will open an action window to record all of the required information and select “Drying” as the remediation method as shown in **Figure 12** below.

Tag	Src. H's	Src. Pkg's	Room	Item	Category
ABCDEF012345670000015180	Metrc Bliss 6/13/2019		Processing Room	Buds - Metrc Bliss	Buds

Figure 11: Select Buds Package and Remediate Button

**Please note that selecting the remediate product for any item other than “Test Failed” product will trigger an empty Remediate Package window.*

Upon completely filling out the information and verifying its accuracy, select the “Remediate Packages” button to complete the action.

Figure 12: Remediate Buds Package by Drying and Curing Longer

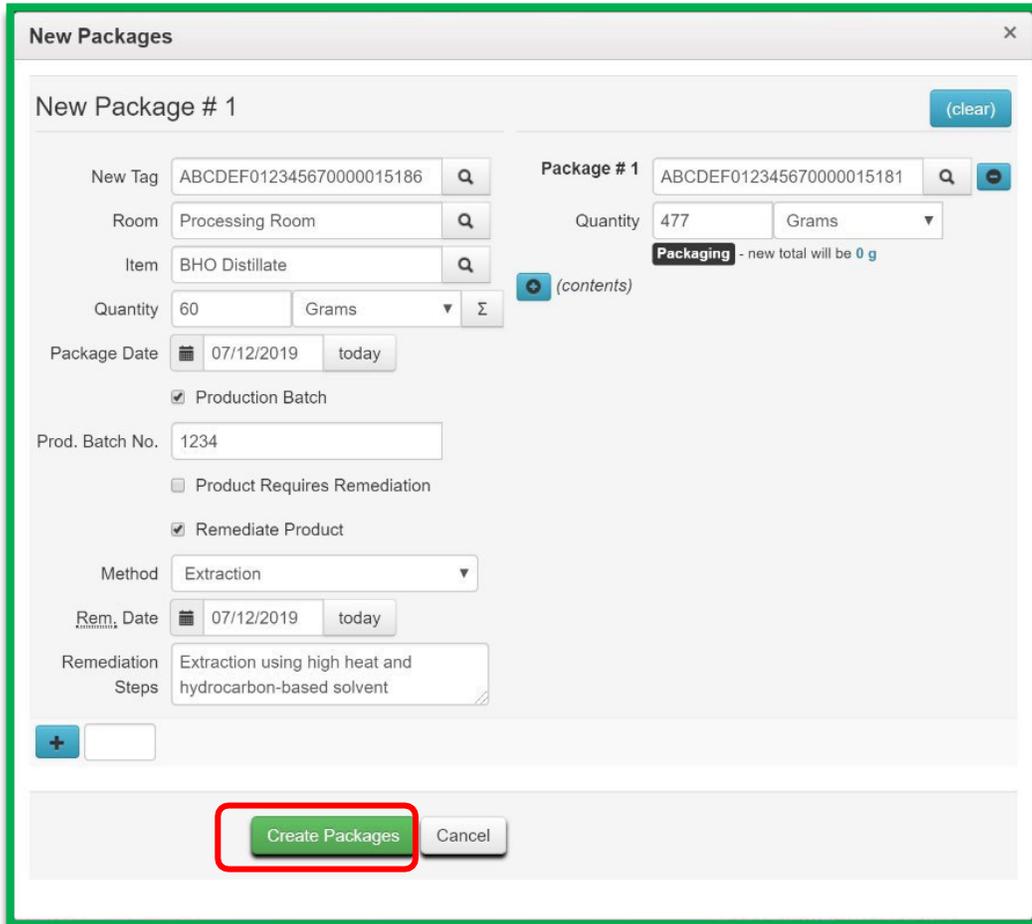
Remediation via Extraction/Further Processing (High Heat and Hydrocarbon-Based Extraction)

Some products in order to be remediated must undergo a process changing the product’s physical/chemical form. This includes the Shake/Trim above that failed for microbials. These processes (extraction for example) would be recorded as a production batch in Metrc and at the same time would record that the process is an action to remediate the product. This step must be done in Metrc. To do this, first select the product that is intended to be extracted and then click on the “New Packages” button as shown in **Figure 13**. This will trigger an action window to open.

Tag	Src. H's	Src. Pkg's	Room	Item	Category	Item Strain	Quantity
▶ ABCDEF012345670000015181	Metrc Bliss 6/13/2019		Processing Room	Shake/Trim - Metrc Bliss	Shake/Trim (by strain)	Metrc Bliss	477 g

Figure 13: Select Package for Extraction

In the New Packages action window, ensure that the “Production Batch” and “Remediate Product” boxes are checked, and all the information that is required has been entered including the remediation method and all steps taken to remediate the product, are completed as “Create Packages” shown in **Figure 15**. Once the information is verified then select the button to complete the process.



The screenshot shows a software window titled "New Packages" with a close button (X) in the top right corner. The window is divided into two main sections: "New Package # 1" and "Package # 1".

New Package # 1 section:

- New Tag:** ABCDEF012345670000015186 (with search icon)
- Room:** Processing Room (with search icon)
- Item:** BHO Distillate (with search icon)
- Quantity:** 60 (with unit dropdown set to Grams and a sum icon)
- Package Date:** 07/12/2019 (with calendar icon and "today" button)
- Production Batch**
- Prod. Batch No.:** 1234
- Product Requires Remediation**
- Remediate Product**
- Method:** Extraction (dropdown menu)
- Rem. Date:** 07/12/2019 (with calendar icon and "today" button)
- Remediation Steps:** Extraction using high heat and hydrocarbon-based solvent (text area)
- +** (add button)

Package # 1 section:

- Package # 1:** ABCDEF012345670000015181 (with search icon and refresh icon)
- Quantity:** 477 (with unit dropdown set to Grams)
- Packaging:** - new total will be 0 g
- (contents)** (with add icon)

At the bottom of the window, there are two buttons: **Create Packages** (highlighted with a red box) and **Cancel**.

Figure 15: Creating a Production Batch Package to Remediate Product

When to Designate a Package a Production Batch

When creating a package, 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 after the actual yield is known.

Locations for Packages

On **August 1st, 2023** locations will be required for all packages in all facility types. This will now include Dispensaries and Stores. Locations for Packages will allow licensees to electronically mirror physical inventory in Metrc. This functionality will allow licensees to organize and locate inventory easily, reconcile inventory faster, and isolate products that may have been contaminated or contain quality issues. Package locations will be a required field moving forward. Once a location is assigned to a package, the location may be changed as the physical inventory is relocated.

Below are detailed descriptions and step-by-step instructions on creating locations for packages.

Creating Locations for Packages

Licensees will be able to add package locations under the Admin area. This will help licenses further be compliant by mirroring their physical and electronic inventory.

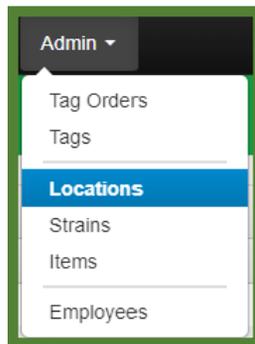


Figure 16: Locations Section

There will be a Locations option under the Admin area as shown in **Figure 16** above. Once in the Locations grid, new locations can be created by selecting the “Add Locations” button as shown in **Figure 17**.

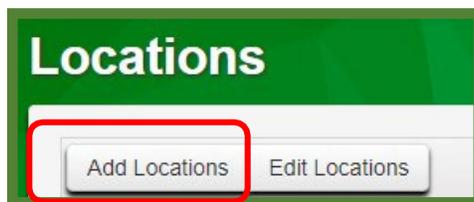


Figure 17: Locations Dashboard

This will open the action window as shown below in **Figure 18**. Note more than one location can be created simultaneously by clicking on the .

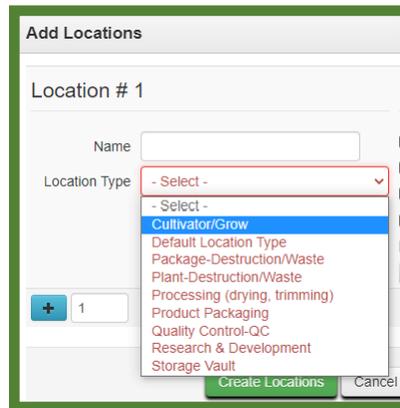


Figure 18: Adding Locations

Best Practices for Managing Package Locations:

- The name of the location(s) created should be identical or have easily identifiable similarities to match the names of rooms or other locations on the licensee’s Licensed Premises floorplan.
- Licensees are encouraged to create a location for packages that are on Administrative Hold or should be quarantined so that the packages can be isolated from other physical inventory.
- As physical inventory is moved or relocated, the virtual location in the licensee’s Metric account should be modified to reflect the change.

“Unit CBD Content” & “Unit THC Content” required for infused items

Date Effective: 07/3/23

All Medical & Adult Use facilities will be required to enter the “Unit CBD Content” and the “Unit THC Content” for each of the items for the item categories listed below.

- All new products created after **July 3rd, 2023** should be created using new items based on the updated item categories listed below.
- All industry users will have until **January 1st, 2024** to sell or repackage their existing Item to correctly reflect the updated requirements for the new and updated item categories.
- Only Items from the following Item Categories will be affected:

Buds
Concentrate (Each) (Medical Only)
Concentrate (Weight) (Medical Only)
Exempt Edible Products (Medical Only)
Exempt Liquid Edible Products (Medical Only)
Hemp (Final Form) Ingestible
Hemp (Final Form) Inhalable
Hemp Concentrate
Hemp Flower/Bud
Hemp Shake/Trim
Infused Edible
Infused Edible (Capsule)
Infused Liquid Edible
Infused Non-Edible
Shake/Trim
Shake/Trim (by strain)
Tincture for Oral Admin
Vape Cart

- The “Unit CBD Content” and “Unit THC Content” is the amount of Total CBD and Total THC that is expected in the final product. Below are some example of adding an item using the Buds, Concentrate (Each) (Medical Only), and Infused Edible to give some examples as shown in **Figure 19**, **Figure 20**, and **Figure 21**.

Add Items

Item # 1 (clear)

Name

Unit of Measure

Category

Strain

U. CBD Content

U. THC Content

Unit Weight

Public Ingredients

Product Photo

Label Photo

Packaging Photo

1

1

Why is there no multi-Facility create such as that available in Employees, Strains, and Locations?

Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

Figure 19: Create/Edit a Bud Item

Add Items ✕

Item # 1 (clear)

Name <input type="text"/>	Unit of Measure - Select -
Category Concentrate (Each) (Medical Only)	U. CBD Content ex. 100.23 <input type="text"/> - Select -
	U. THC Content ex. 100.23 <input type="text"/> - Select -
	Unit Weight ex. 100.23 <input type="text"/> - Select -
	Public Ingredients List of Public Ingredients...
	Description Description...
	Product Photo <input type="button" value="Select files..."/>
	Label Photo <input type="button" value="Select files..."/>
	Packaging Photo <input type="button" value="Select files..."/>

<input type="button" value="+"/>	<input type="text" value="1"/>	<input type="button" value="↓"/>	<input type="button" value="↑"/>	(ingredient)
<input type="button" value="+"/>	<input type="text" value="1"/>	<input type="button" value="↓"/>	<input type="button" value="↑"/>	(item)

Why is there no multi-Facility create such as that available in Employees, Strains, and Locations?

Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

Figure 20: Create/Edit A Concentrate Item

Add Items

Item # 1 (clear)

Name	<input type="text"/>	Unit of Measure	- Select -
Category	Infused Edible	Admin. Method	<input type="text"/>
		U. CBD Content	ex. 100.23 - Select -
		U. CBD Content Dose	ex. 100.23 - Select -
		U. THC Content	ex. 100.23 - Select -
		U. THC Content Dose	ex. 100.23 - Select -
		Unit Volume	ex. 100.23 - Select -
		Unit Weight	ex. 100.23 - Select -
		Serving Size	<input type="text"/>
		Number of Doses	<input type="text"/>
		Public Ingredients	List of Public Ingredients...
		Description	Description...
		Product Photo	Select files...
		Label Photo	Select files...
		Packaging Photo	Select files...

+ 1 (ingredient)

+ 1 (item)

Why is there no multi-Facility create such as that available in Employees, Strains, and Locations?

Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

Create Items Cancel

Figure 21: Create/Edit an Infused Edible Item

Tagging Immature Plant Batches

Cultivators will be required to start tagging Immature Plant Batches of up to 100 immature plants starting on **August 1st, 2023**. The process will work similarly to creating planting from a package, by selecting the package and then the Create Plantings button, as shown in **Figure 22** below when plantings are unpacked.

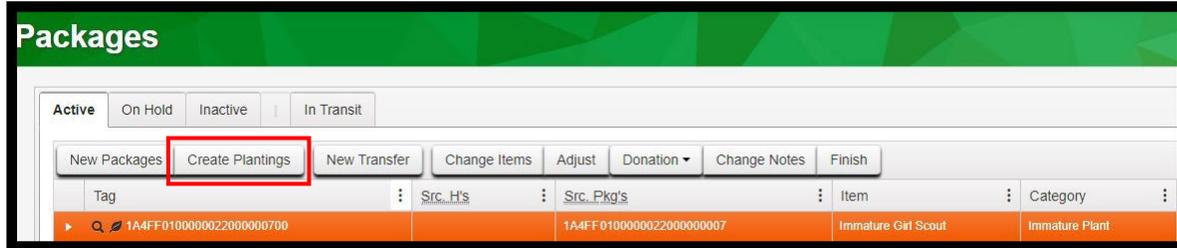


Figure 22: Creating Plantings from an Immature Plants Package

Similar to the current process, when creating new plantings, it will be required to select the data points below with the addition of a new Immature Plant Tag and Location as seen below in **Figure 23**. This will facilitate a new single Metrc plant tag for each strain specific Immature Plant Batches which can be up to 100 immature plants.

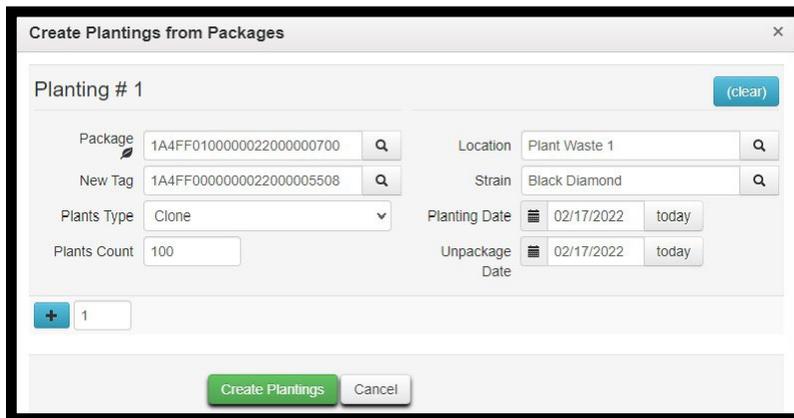


Figure 23: Creating Plantings from an Immature Plants Package

The batch of up to 100 immature plants, must be labeled. A good practice is to tag the front of the container where the Immature Plants are located for an easy visual reference as shown below in **Figure 24**.



Figure 24: Tagging Immature Plant Batches

Patient Limit Information

Dispensary agents must utilize the patient lookup available in the OneStop portal to verify that:

1. The patient or caregiver is currently registered & assigned to one another,
2. The patient has a current certification, **and**
3. The patient has not already been dispensed his/her limit of medical cannabis in the past 30 days .

The five-step process detailed below is what all dispensary agents should be following and is covered during the MD Advanced Dispensary Training.

1. Ask for a government photo ID:
 - a. Patient or caregiver that is making the purchase should present a government-issued photo ID.
 - b. Acceptable forms of government-issued photo ID include driver's license, MVA ID card, passport, and military ID.
 - c. Caregivers must make a purchase for a minor patient who is under 18 years old.
2. Ask for MMCC/MCA ID Number:
 - a. Every patient and/or caregiver has a unique MMCC/MCA ID number.
 - i. Patients may have a MMC/MCAC ID card present.
 - ii. Caregivers must have a MMCC/MCA ID card present.
3. Log into OneStop:
 - a. OneStop may be accessed [here](#).
 - b. User sign in should be your OneStop username and password.
 - c. Patient lookup is available for dispensary agents.
4. Enter Patient and Caregiver (if applicable) MMCC/MCA ID #:
 - a. Dispensary agents must always enter patient MMCC/MCA ID #.
 - b. If a caregiver is present, the dispensary agent must enter the caregiver MMCC/MCA ID # along with the patient MMCC/MCA ID #.
5. Verify Patient and Caregiver are eligible to purchase:
 - a. Photo should match the person(s) present.
 - b. Patient should not have exceeded their limits of dried flower or THC.
 - c. The system should not present any error messages.

Newly Required Fields for Sales

On **July 1st, 2023**, several fields will now be required by MCA compliance when recording sales receipts. To access the fields, select the expand button for *Transaction Details* related to each package as shown in **Figure 25** below.

The screenshot shows the 'Record Receipts' application window. At the top, it says 'Sales Receipt # 1' with a '(clear)' button. Below this, there are fields for 'Sale Date/Time' (12/13/2022, today) and 'Customer' (Consumer, Patient, Caregiver). The 'Package # 1' section shows a package ID '1A4FF030000E1A000001003', quantity '1', and 'Each' unit. The 'Available' field shows '8 ea' and the 'Total Price' is '\$ 40.06'. A red box highlights the 'Transaction Details' expand button. Below this, the 'Transaction Details' section is expanded, showing fields for 'Invoice Number' (1234), 'Price' (\$ 30.00), 'Excise Tax' (\$ 4.95), 'City Tax' (\$ 3.00), 'County Tax' (\$ ex. 100.23), 'Municipal Tax' (\$ ex. 100.23), 'Discount Amount' (\$ 1.50), 'SubTotal' (\$ 36.45), and 'SalesTax' (\$ 3.61). At the bottom, there are 'Record Sales Receipts' and 'Cancel' buttons.

Figure 25: Sales Receipt – Transaction Details: *This functionality was previously released as New Optional Fields for Sales on 1/20/23, communicated within Metrc Bulletin 65. As of 7/1/2023, the fields will no longer be optional.*

Below is a list and description and requirements for sales fields:

- **Invoice (Required)**
 - Invoice number which documents the sale to the customer, such as the invoice number from a POS system.
- **Price (Required)**
 - Pre-tax/net selling price before all taxes
- **Excise Tax**
 - Maryland is not using this field at this time.
- **City Tax**
 - Local business tax imposed by a local jurisdiction.
- **County Tax**
 - County tax imposed by a county, when applicable
- **Municipal Tax**
 - Maryland is not using this field at this time.
- **Discount (Required if applicable)**
 - Use this field to record the “below the line” discount, if any, applied to the overall ticket value
 - Enter the Discount as a positive value.
- **Subtotal (Required)**
 - Price + Excise Tax + City Tax + County Tax + Municipal Tax – Discount
 - Do not include the Sales Tax
- **Sales Tax (Required)**
 - A dispensary must assess a 9% sales and use tax for the sale of cannabis to adult use consumers in accordance with the Tax – General Article, §11-104(K), Annotated Code of Maryland. Sales tax does not apply to sales to qualifying patients.

The value in the existing *Total Price* field for each package should be entered as the *Subtotal + Sales Tax*. Continuing from the example in **Figure 25** above with a *Subtotal* of \$36.45 and *Sales Tax* of \$3.61, a value of \$40.06 should be entered in the *Total Price* field as highlighted in **Figure 26** below.

Package # 1	1A4FF0300000E1A000001003	Quantity	1	Each
Available	8 ea	Total Price	\$ 40.06	

Figure 26: Sales Receipt – Entry in Total Price Field

The Transaction Details can be viewed in the Sales Receipt drill down by un hiding the columns as shown in **Figure 27** below. To unhide the columns, click on the three vertical dots on any column in the drill down and select the Columns option from the menu. Mark the checkboxes for the columns you wish to display.

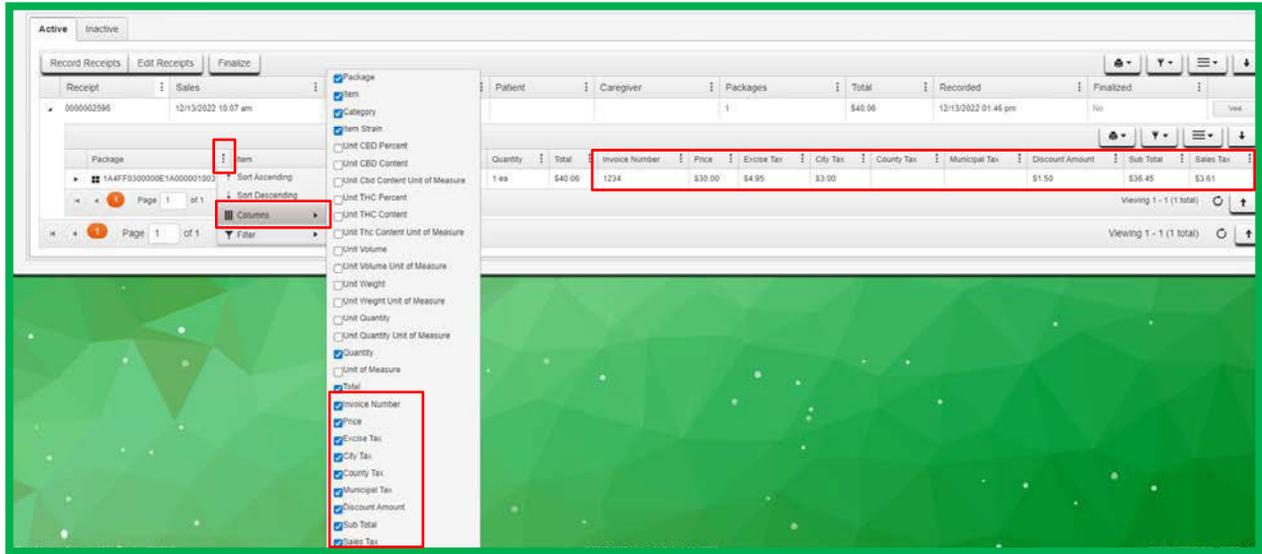


Figure 27: Sales Receipt – Transaction Details Tab

The sales fields can also be entered using the CSV import feature in Metrc. The on-page formatting guide for the *New and Update Sales Receipts Imports* has been updated to provide directions on how to create these CSV files. **Figure 28** below shows the updates to the *New Sales Receipts Import*. **Please note:** The format for the CSV has changed and these columns are required even though you will not be using these fields at this time.

CSV Columns	CSV Example
<ol style="list-style-type: none">1. Sale Date/Time2. Customer Type3. Patient License Number4. Caregiver License Number5. Identification Method6. Package Label7. Quantity8. Unit of Measure9. Unit Thc Percent10. Unit Thc Content11. Unit Thc Content Unit of Measure12. Unit Weight13. Unit Weight Unit of Measure14. Total Amount15. Invoice Number16. Price17. Excise Tax18. City Tax19. County Tax20. Municipal Tax21. Discount Amount22. SubTotal23. SalesTax	<pre>10/4/2016 4:44:53 PM,Consumer,,,,,ABCDEF012345670000010331,1,Ounces,,,,,9.99,ABC123,100.01,1.01,2.02,3.03,4.04,5.05,6.06,7.07 10/4/2016 4:44:53 PM,Consumer,,,,,ABCDEF012345670000010332,1,Ounces,,,,,9.99,XYZ456,200.02,2.02,4.04,6.06,8.08,10.10,12.12,14.14</pre> <p>A CSV header row must not be included.</p> <p>Files must be plain-text only (e.g. CSV and TXT).</p>

Figure 28: On-Page CSV Guide - New Sales Receipt Import

Any questions or concerns about the sales field requirements should be directed to enforcement.mmcc@maryland.gov.

Metrc Resources

On the far right of the long black navigational toolbar, there is a Support dropdown as shown in **Figure 29** below. This dropdown can be utilized to reference the Metrc Manual/User Guide, Maryland Supplemental Guide, Industry Reports Guide, info to contact Metrc Support, and sign up for training. These tools can be used anytime for no additional charges as long as you are entered within an active licensed business.



Figure 29: Support Section

[Metrc Learn](#) and the [Metrc Knowledge Center](#) may also be accessed using these links.

Metrc Learn is an interactive learning management system, that allows users to complete all training on demand including Advanced trainings by facility type and modular training for multiple areas of Metrc. The system will teach specific functionality and processes, allow the user to demonstrate the functionality being discussed. Completed training information will even be able to be exported.

The Metrc Knowledge Center is a portal that provides on-demand access to various resource materials including past bulletins and helpful links to users. This center is designed to be a supplemental resource to Metrc Support, providing options for self-assistance with documentation, a live-chat feature, and the ability to submit support tickets directly to the Support team.

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