Metrc Support Bulletin

Bulletin Number: RI_IB_0014	Distribution Date: 09/22/2023	Effective Date: 10/05/2023
Contact Point: Metrc Support	Subject: New updates now available in Metrc	
Reason: New functionality and features are now available in Metrc.		

Metrc is pleased to provide information on the latest system enhancements that will be available on 10/05/2023, including:

- Ability to adjust the number of plants in a Plant Batch
- CSV for Plant Batch Adjustments
- Reporting Operational Exceptions

Please read on for more information regarding this new functionality.

Ability to Adjust Plant Batch

An Adjust button has been added to the Immature Plants grid that allows licensees to adjust the number of plants in a Plant Batch – see **Figure 1**. After clicking the Adjust button in the plants section, an action window will appear allowing you to adjust the Plant Batch count. The action window has the same fields at the Adjust Package action window, including:

- Group Name
- Quantity
- Adjust Quantity
- New Quantity
- Adjustment Reason
- Note
- Adjustment Date

An Adjustment Reason is required whenever adjusting a plant batch. Select the most accurate description from the Reason dropdown provided within the action window. If none of the predetermined options fully explain the adjustment, provide more information in the Optional Note field. See **Figure 2** below**.**
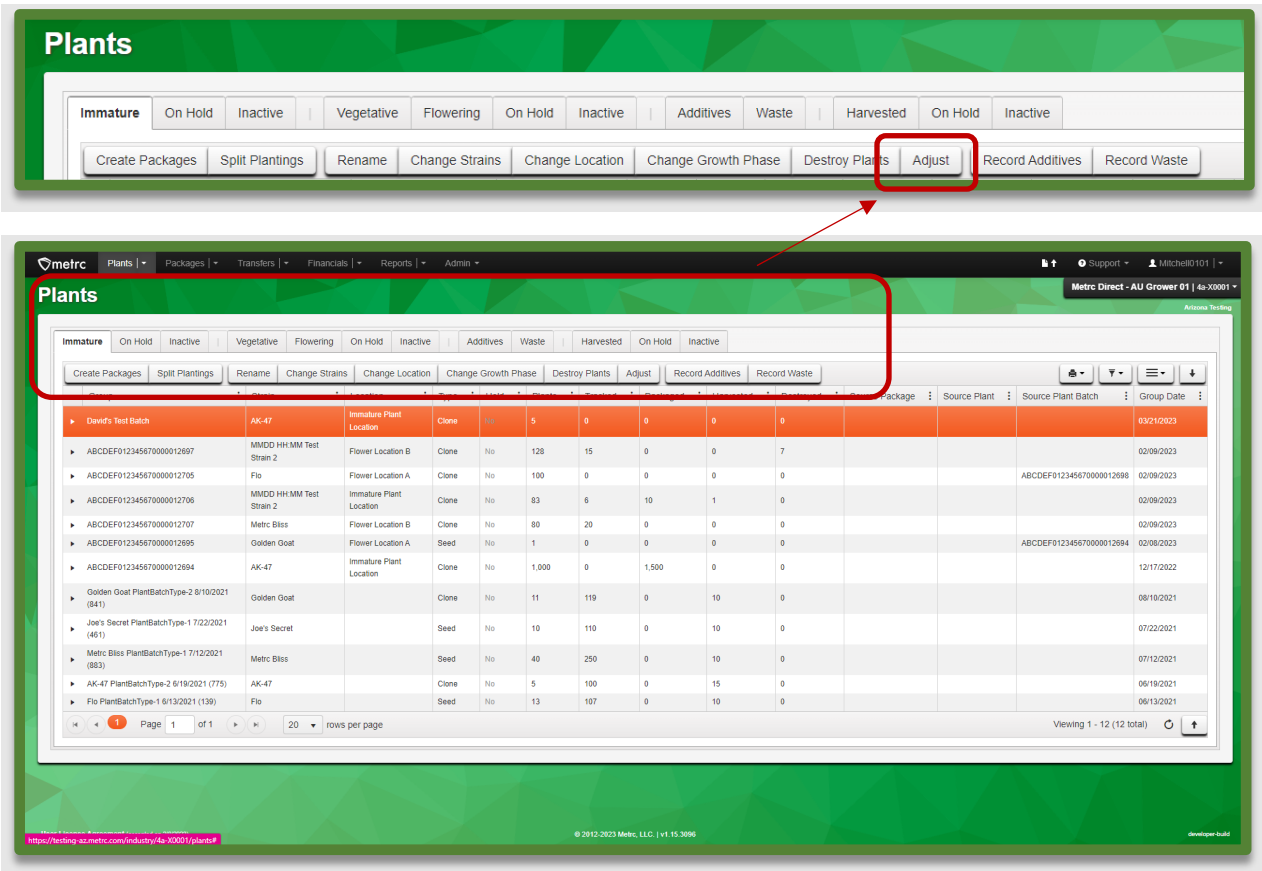

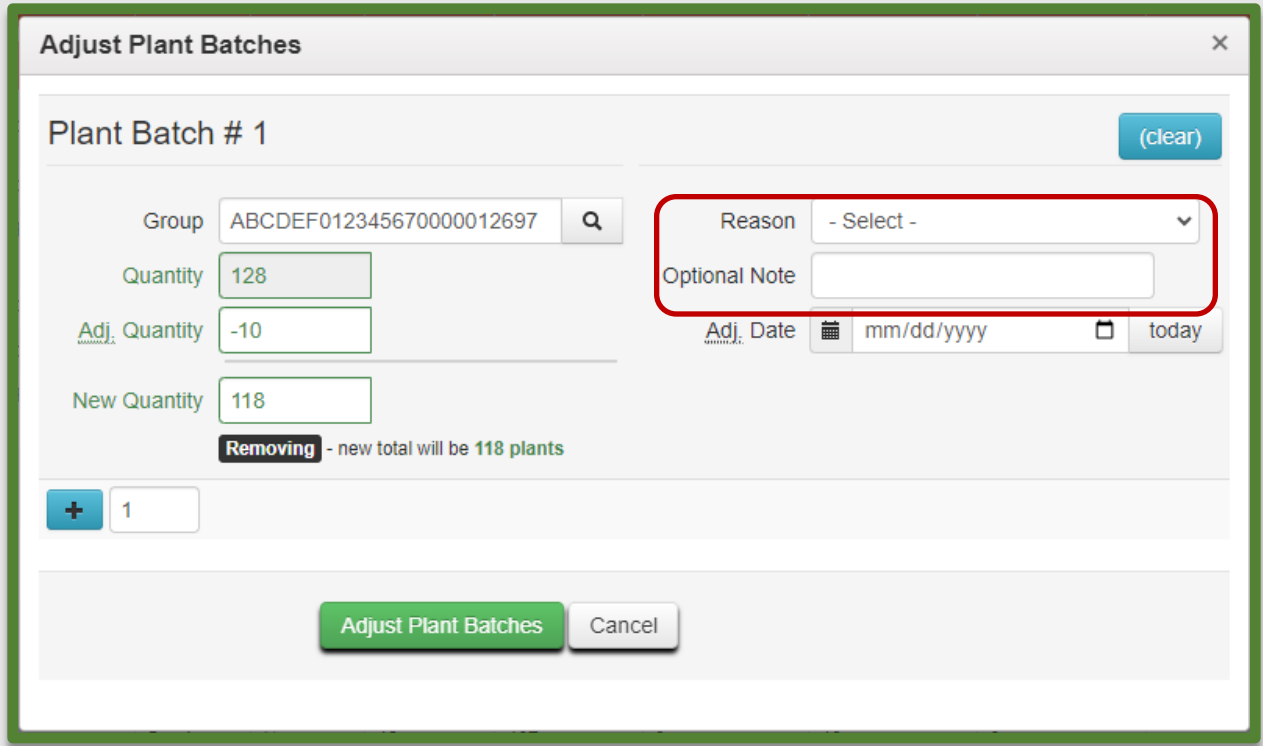**Figure 1: Plants Grid with new Adjust button**

Figure 2: Adjust Plant Batches action window

CSV for Plant Batch Adjustments

To increase the efficiency of the adjust immature plant batches feature, Metrc built functionality that allows the licensee to adjust multiple batches by uploading a CSV file in the format shown in **Figure 3.**
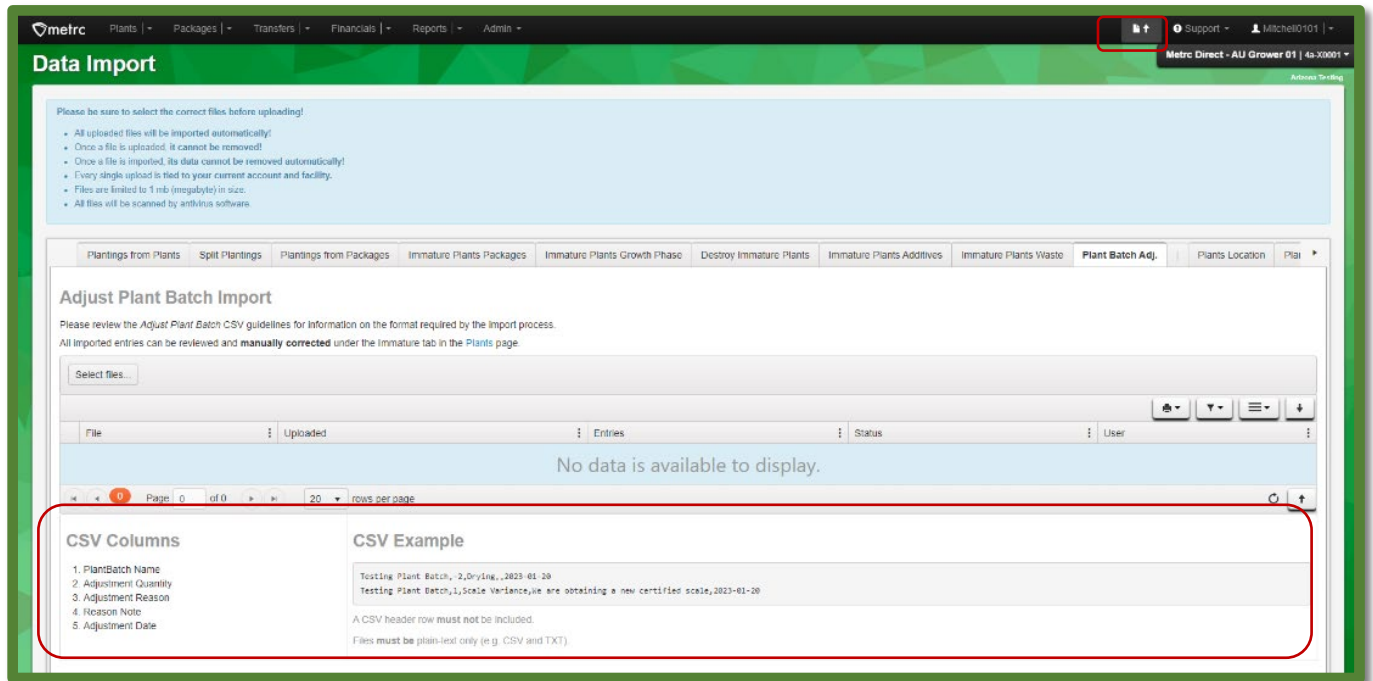

Figure 3: CSV upload

Follow these steps for uploading your Adjust Plant Batch CSV:

- Navigate to the Data Import section of Metrc by clicking on the [icon] icon near the support area in the Navigation Toolbar, then click on the Plant Batch Adj. tab.
- Create a new CSV (Comma Delimited) file using the column format listed under the CSV Columns section or create a text file using the format listed in the CSV Example shown in **Figure 3**.
- Choose the 'Select files...' button to find the relevant file and import the manual upload.
- Once the file is successfully uploaded, the Plant Batches listed in the CSV will be adjusted.

If there are additional formatting questions or wish to upload Data Imports for other areas in the software, navigate to the Support drop-down in the Navigation Toolbar and select the CSV Formatting Guide shown in **Figure 4** below**.**
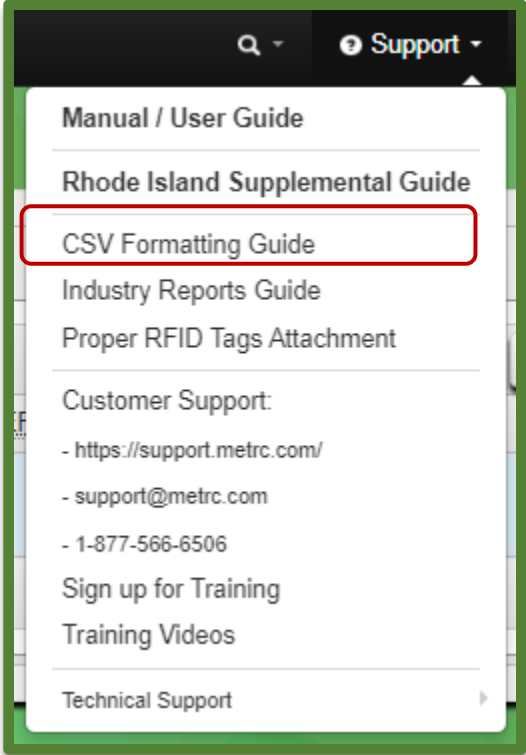
Figure 4: CSV Formatting Guide

Reporting an Operational Exception

Licensees who have an operational exception period that restricts inventory activity will have a new Operational Exception report available to them that allows licensees to inform the state of their pause in business operations. This optional reporting functionality is performed by submitting the information and data through the new functionality in the State inventory tracking system. To streamline reporting opportunities for licensees and provide regulators with real-time status of cannabis activity, Metrc has created new functionality called **Operational Exception.**

Please see below for a step-by-step guide to this new functionality:

1. Confirm that the employee who will be utilizing this functionality has Operational Exception permissions granted by the Metrc admin as shown in **Figure 5**. This can be done by selecting Employees under the Admin area on the navigational toolbar.
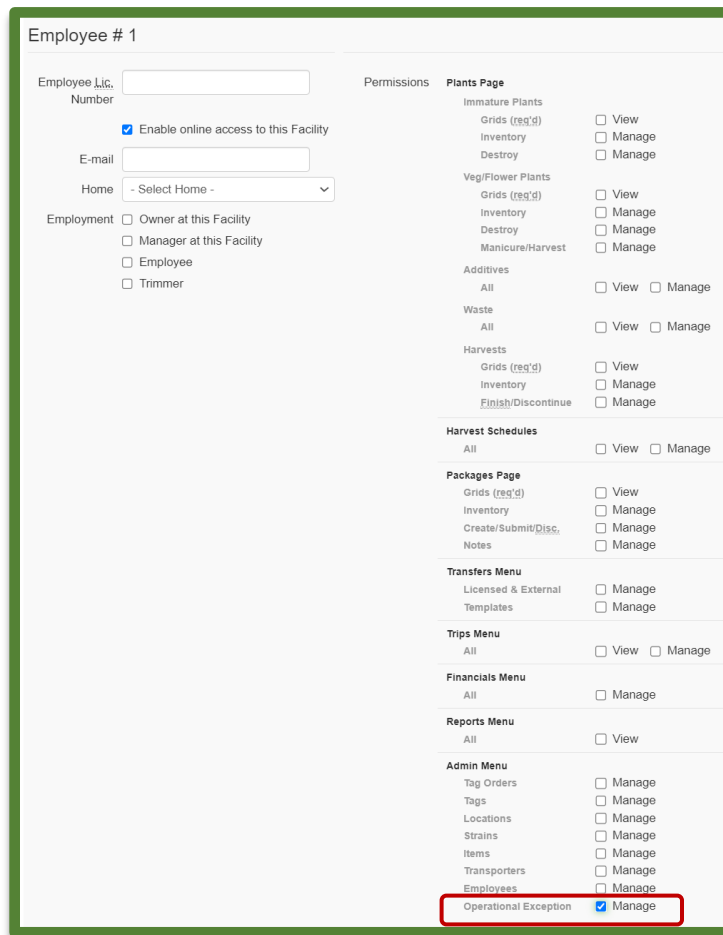
Figure 5: Permission for Operational Exception for a user

2. Once the permission has been granted and declaration of Operational Exception is needed, go to the Admin area and select the Operational Exception option as shown in **Figure 6**.
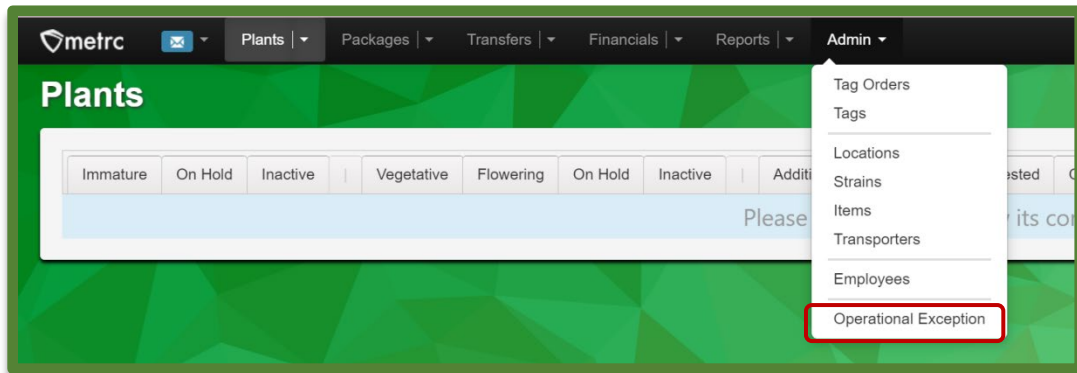

Figure 6: Operational Exception option

3. This will open the Operational Exception grid, then select the 'Add Operational Exception' button as shown in **Figure 7**.
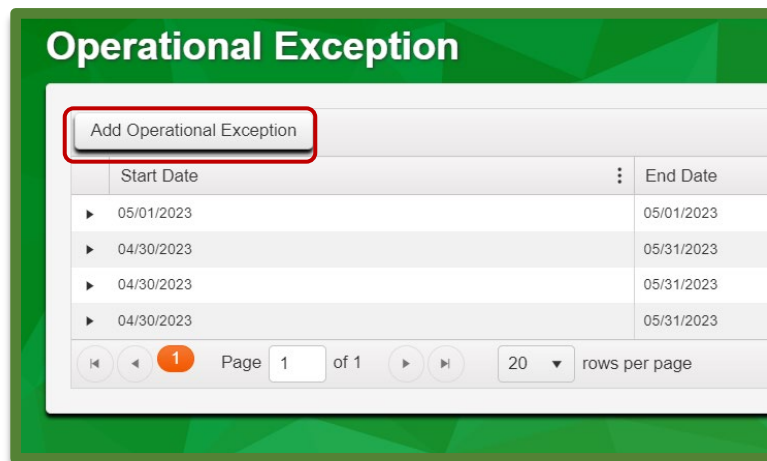

Figure 7: Add Operational Exception Button

4. The Add Operational Exception action window will appear, and all required fields must be filled out. The start date and end date should be the first and last day in which the Operational Exception is being reported. For example, if needing to submit Operational Exception for June, select June 1, 2023 for the start date, and June 30, 2023 for the end date. See **Figure 8.**

5. Next select the items being reported which are required for the facility type including Harvests, Plants, and/or Packages. Then fill in the information of who is completing the report including First Name, Last name, Role, Email, and Phone Number.

Figure 8: Add Operational Exception Action Window

6. To finalize the report, select 'Record Operational Exception' at the bottom of the action window as shown in **Figure 9**.
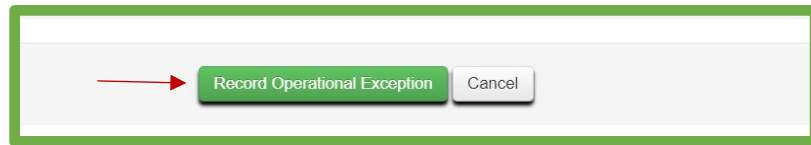

Figure 9: Record Operation Exception

7. The completed report will appear in the Operational Exception grid as shown in **Figure 10**.

Figure 10: Operational Exception Grid

If there are further questions or additional support is needed, please utilize the available resources listed below.

Metrc Support: Email Support@metrc.com, call 877-566-6506, or log into our Support Portal and navigate to 'Contact Us' to log a ticket or live chat a Support team member.

Access additional self-help resources: In the Metrc system, click on the 'Support' dropdown in navigation toolbar to select the appropriate resource including educational guides and more.