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| Bulletin Number: MT_IB_0045_Processing Jobs | Distribution Date: 1/31/2024 | Effective Date: 2/1/2024 |
| Contact Point: Metrc Support | Subject: New Production Batch Feature | |
| Reason: New functionality and features are now available in Metrc. | | |

Greetings,

Metrc, in conjunction with the Montana Cannabis Control Division, is announcing new functionality relating to the change in the production batch process. The updated process leverages the newly created processing job workflow.

The CCD has created documentation to support licenses in preparing ahead of this change:

Processing Job Type Template

https://mtrevenue.gov/wp-content/uploads/dlm_uploads/2024/01/Processing-Job-Type-Template-1-1.pdf

This functionality replaces the production batch process. The processing job functionality allows for multiple packages to be created at different times from the same inputs. The ability to create a production batch outside of the processing job will be removed once the processing job functionality is enabled.

A detailed description of these enhancements is provided on the following pages.

Configuring Processing Job Types & Permissions

Before the new Processing Jobs functionality can be used, the Admin of the account must enable the necessary permissions to view and manage Processing Jobs for themselves and any employees intending to use this function.

- To add the permission to view and/or manage Processing Jobs, go to the Employees grid in the Admin area dropdown from the Navigational Toolbar – **see Figure 1.**

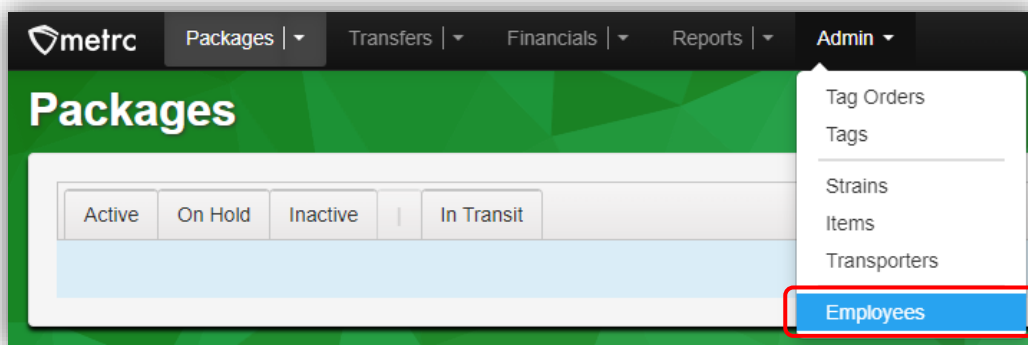


Figure 1: Employee area in Admin dropdown

- Once on the Employees grid, highlight the Employee needing the permissions added and select the Edit Employees button – **see Figure 2.**

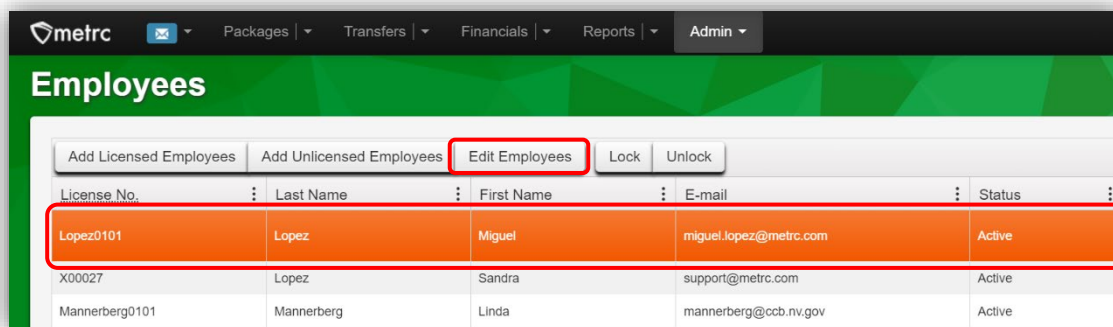


Figure 2: Edit Employees button in the Employees Grid

- The user should now see the Edit Employees action window. Here, assign the necessary Processing Jobs permissions to the user to view or manage by checking the box next to one or all the following permissions – **see Figure 3.**
 - Processing Jobs Page – Grids (req'd) - View
 - Processing Jobs Page – Inventory - Manage
 - Admin Menu – Processing Job Types - Manage

| Permissions | | |
|-----------------------------|--|--------|
| Packages Page | | |
| Grids (req'd) | <input checked="" type="checkbox"/> | View |
| Inventory | <input checked="" type="checkbox"/> | Manage |
| Create/Submit/Disq. | <input checked="" type="checkbox"/> | Manage |
| Notes | <input checked="" type="checkbox"/> | Manage |
| Processing Jobs Page | | |
| Grids (req'd) | <input checked="" type="checkbox"/> | View |
| Inventory | <input checked="" type="checkbox"/> | Manage |
| Transfers Menu | | |
| Licensed & External | <input checked="" type="checkbox"/> | Manage |
| Templates | <input checked="" type="checkbox"/> | Manage |
| Trips Menu | | |
| All | <input type="checkbox"/> View <input checked="" type="checkbox"/> Manage | |
| Financials Menu | | |
| All | <input checked="" type="checkbox"/> | Manage |
| Reports Menu | | |
| All | <input checked="" type="checkbox"/> | View |
| Admin Menu | | |
| Tag Orders | <input checked="" type="checkbox"/> | Manage |
| Tags | <input checked="" type="checkbox"/> | Manage |
| Locations | <input checked="" type="checkbox"/> | Manage |
| Strains | <input checked="" type="checkbox"/> | Manage |
| Items | <input checked="" type="checkbox"/> | Manage |
| Processing Job Types | <input checked="" type="checkbox"/> | Manage |
| Transporters | <input checked="" type="checkbox"/> | Manage |
| Employees | <input checked="" type="checkbox"/> | Manage |
| Operational Exception | <input checked="" type="checkbox"/> | Manage |

Figure 3: Assign Processing Jobs permissions

After permissions are enabled, the user can then configure the Processing Job Types used at the manufacturing facility. To configure, use the following steps:

- Go to the Processing Job Types option under the Admin area dropdown in the Navigational Toolbar – see **Figure 4**.

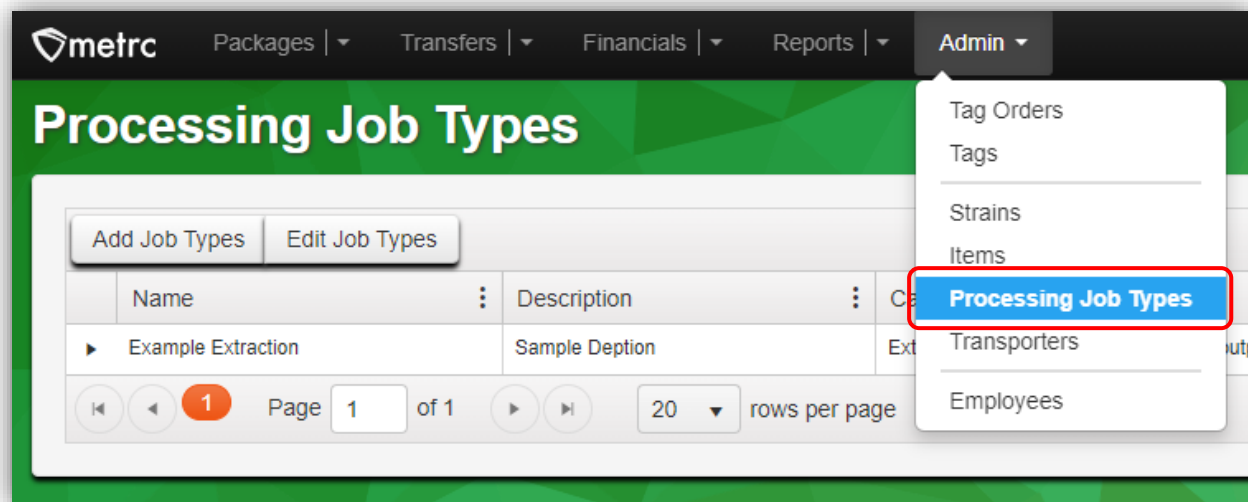


Figure 4: Processing Job Types grid in the Admin dropdown

- Once on the Processing Job Types grid, click the Add Job Types button to access the Add Job Types action window – see **Figure 5**.

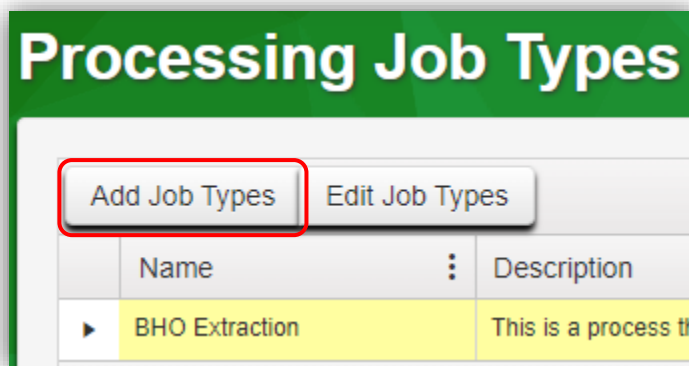


Figure 5: Add processing Job Type

- All the following fields in the Add Processing Job Types action window must be completed – see Figure 6.
 - **Name** – description for the process job
 - **Category** – use dropdown to select the CCD-configured Category option.
 - To determine the correct category reference the section below, **CCD Approved Categories and Attributes**.
 - **Description** – definition of the process being done.
 - **Processing Steps** – detailed steps used in the process.
 - **Attributes** – add one or more.
 - To add multiple attributes, use the blue plus sign button.
 - Select the attributes from the CCD-configured options using the Search button (magnifying glass icon) – see Figure 7 below.
 - To determine the correct attribute(s) reference the section below, **CCD Approved Categories and Attributes**.

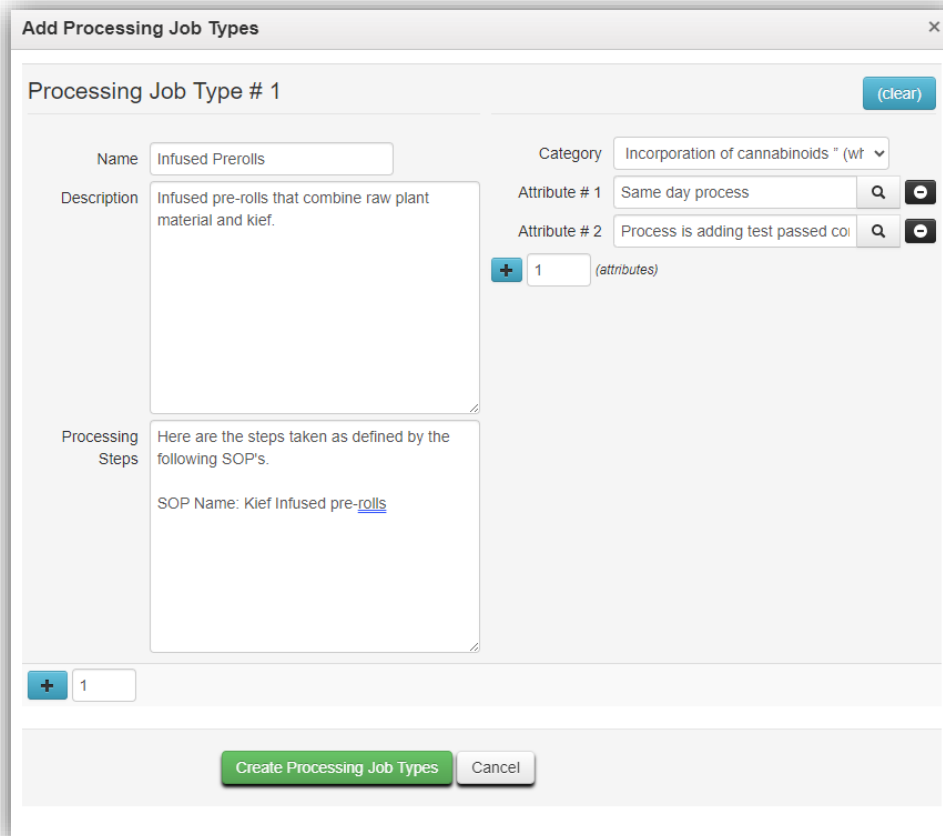


Figure 6: Add Processing Job Types action window

Important Note: You cannot edit these details after the Create Processing Job Types button is clicked. After this action is taken, only the Name and Description can be edited.

Select

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Name

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| 1-2 week job |
| 1-day process |
| 14-21 day process |
| 2-day process |
| 3-day process |
| 4-6 day process |
| 7-14 day process |
| Outputs are a Marijuana infused product meant for means other than oral consumption or intended to be an ingredient in a MIP intended for means other than oral consumption. |
| Outputs are a Marijuana infused product meant for oral consumption or intended to be an ingredient in a MIP intended for oral consumption |
| Outputs are an intermediate product meant to be further processed into concentrate/extract |
| Process is adding test passed concentrate to test passed biomass to create a new concentrate product that will require retesting (moon rocks, infused prerolls) |
| Process is test passed biomass to another test passed biomass to create a mixed blend that will require retesting. (House blends) |
| Process uses non-solvent based extraction. (water, ice, dry ice, a press, sieve, or filter) |
| Process uses solvent based extraction. (Hydrocarbon solvents, Oxygenated solvents, Halogenated solvents) |
| Process uses super critical/subcritical CO2 extraction. (CO2) |
| Same day process |

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20

rows per page

Viewing 1 - 16 (16 total)

Select

Cancel

Figure 7: Selecting processing jobs Attributes

Starting a Processing Job

After a Processing Job Type is created, it can be used to create Processing Jobs that were previously captured through the Production Batch process by anyone with permission to create Processing Jobs. To start a Processing Job:

- Choose the Processing Jobs option found under the Packages area dropdown in the Navigational Toolbar – **see Figure 8.**

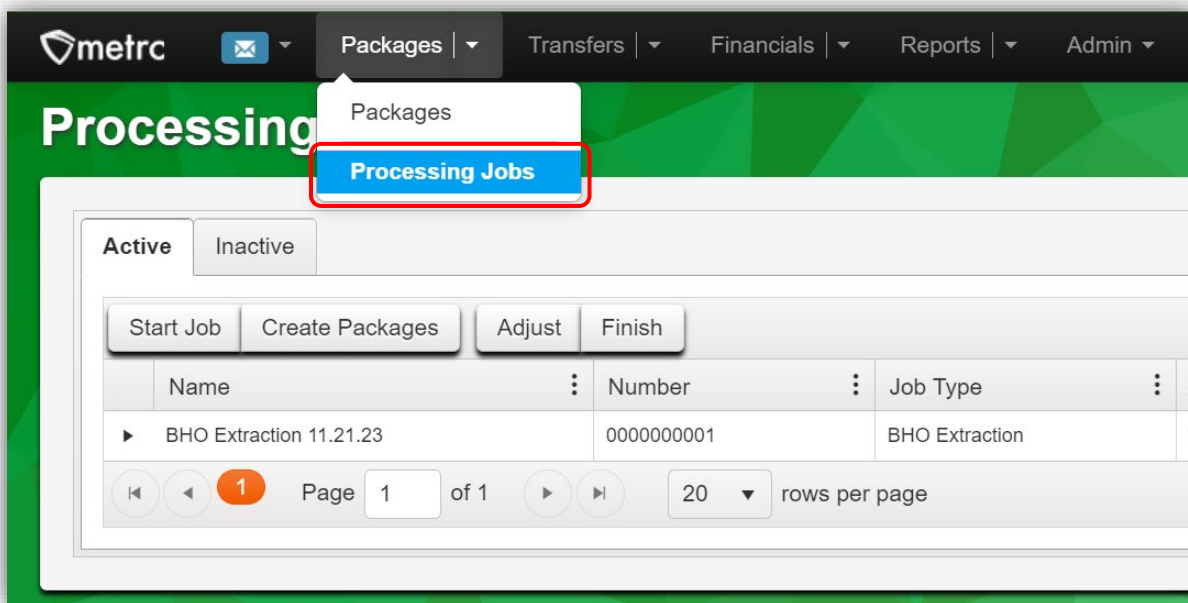


Figure 8: Processing Jobs grid in Packages dropdown

- This will open the Processing Jobs grid. Select the Active tab, then click the Start Job button to access the Start Processing Job action window – **see Figure 9.**

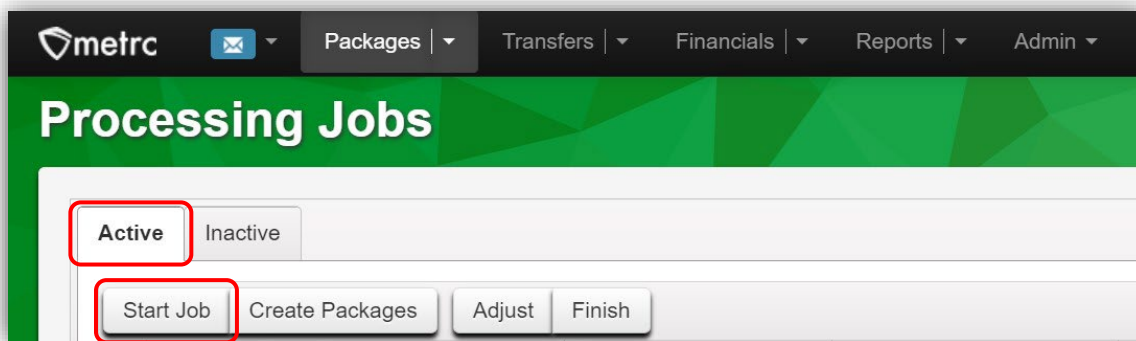


Figure 9: Start a processing job

- Enter the required information in the action window – **see Figure 10.**
 - **Processing Job Type** – use the dropdown which contains the previously created options from the Processing Job Types.
 - **Processing Job Name**
 - The Processing Job name will record all the same production batches under the same processing job, similar to how harvest batch packages are tied to the same harvest batch.
 - **Start Date** – use the calendar option, choose ‘today’, or type in manually.
 - **Package** – use the Search button to choose the Package(s) that will be used as inputs for the Processing Job (add multiple packages with the black “+” button)
 - **Quantity** – enter the amount(s) used from the input packages.
 - Select the Unit of Measure from the dropdown.
 - Choose the matching UoM in the Total Count, Total Volume, or Total Weight dropdown depending on your inputs (this will auto-sum your inputs)
- When ready, click the green Create Processing Job button to save the job.

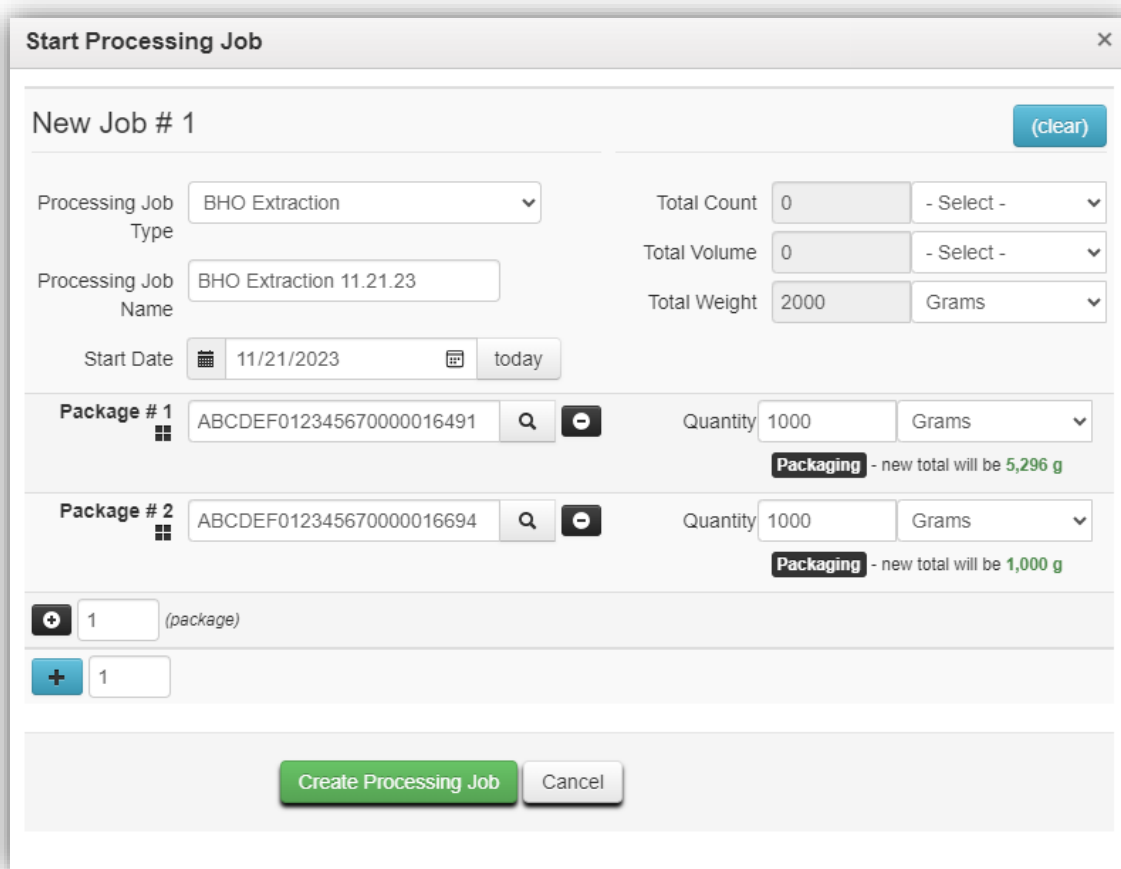


Figure 10: Start Processing Job action window

Adjusting Processing Jobs

If an entry error occurs on the Processing Job inputs, the Adjust feature should be used to correct it. To adjust a Processing Job:

- Go to the Processing Jobs option found under the Packages area drop-down in the Navigational Toolbar – **see Figure 11.**

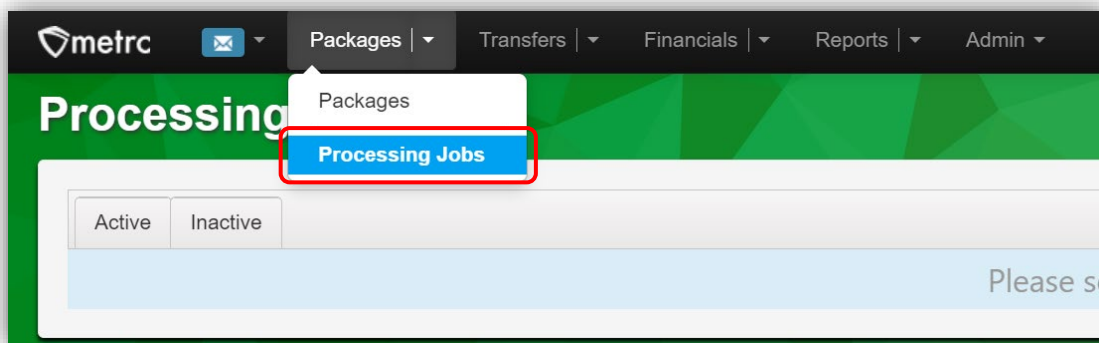


Figure 11: Processing Jobs grid in the Packages dropdown

- Once on the Processing Jobs grid, select the Active tab, highlight the Processing Job to adjust, then select the Adjust button to access the Adjust Processing Jobs action window – **see Figure 12.**

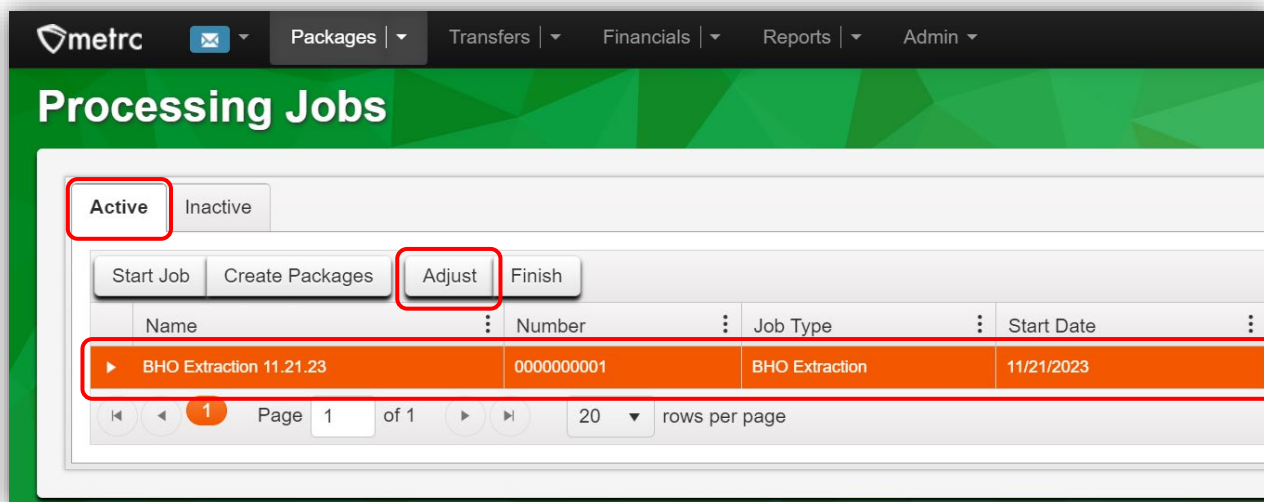
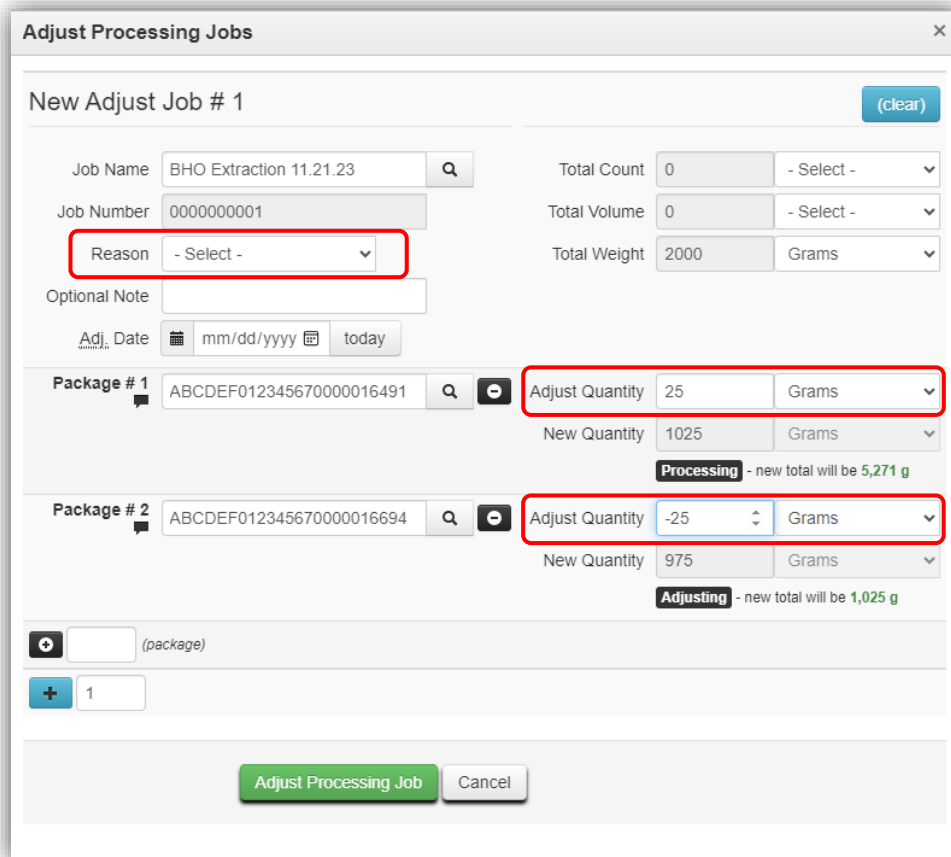


Figure 12: Adjust a Processing Job

- Enter the Adjust Quantity for the inputs – **see Figure 13.**
 - This should be the amount being adjusted from the original input amount
 - Enter a positive number if adding
 - Enter a negative number if subtracting
 - Total Weight at the top will auto-sum after adjustments are entered
- Select a Reason from the dropdown and add appropriate note.
- Click the green Adjust Processing Job to finalize the change.



Adjust Processing Jobs

New Adjust Job # 1 (clear)

Job Name: BHO Extraction 11.21.23

Job Number: 0000000001

Reason: - Select -

Optional Note:

Adj. Date: mm/dd/yyyy today

Total Count: 0 - Select -

Total Volume: 0 - Select -

Total Weight: 2000 Grams

Package # 1: ABCDEF012345670000016491

Adjust Quantity: 25 Grams

New Quantity: 1025 Grams

Processing - new total will be 5,271 g

Package # 2: ABCDEF012345670000016694

Adjust Quantity: -25 Grams

New Quantity: 975 Grams

Adjusting - new total will be 1,025 g

(package)

1

Adjust Processing Job Cancel

Figure 13: Adjust Processing Jobs action window

Creating Packages from a Processing Job

Once the Processing Job has been created, the user can create packages that were previously marked as Production Batch Packages. To create packages, complete the following fields in the Create Packages from Processing Job action window – **see Figure 14.**

- **Job Name** - select the Processing Job that is producing the new package(s).
- **New Tag** –select the New Metrc Package Tag ID.
- **Location** – select the Location of the package.
- **Item** – select the Item type of the package.
- **Quantity** – enter the Quantity of the production batch package.
- Add a Note (optional)
- **Prod. Batch No.** – Production Batch Number can be entered here.
 - If multiple packages are created from the same Processing Jobs, different Prod. Batch No.'s should be used for each.
- **Package Date** – enter manually, use the calendar option, or click the today button.
- If the Processing Job is complete, the user can finish the job while creating the final production batch by selecting the checkbox next to Finish Processing Job. (These steps will be outlined in the next section)
- Select the green Create Packages button to complete the creation of the package.

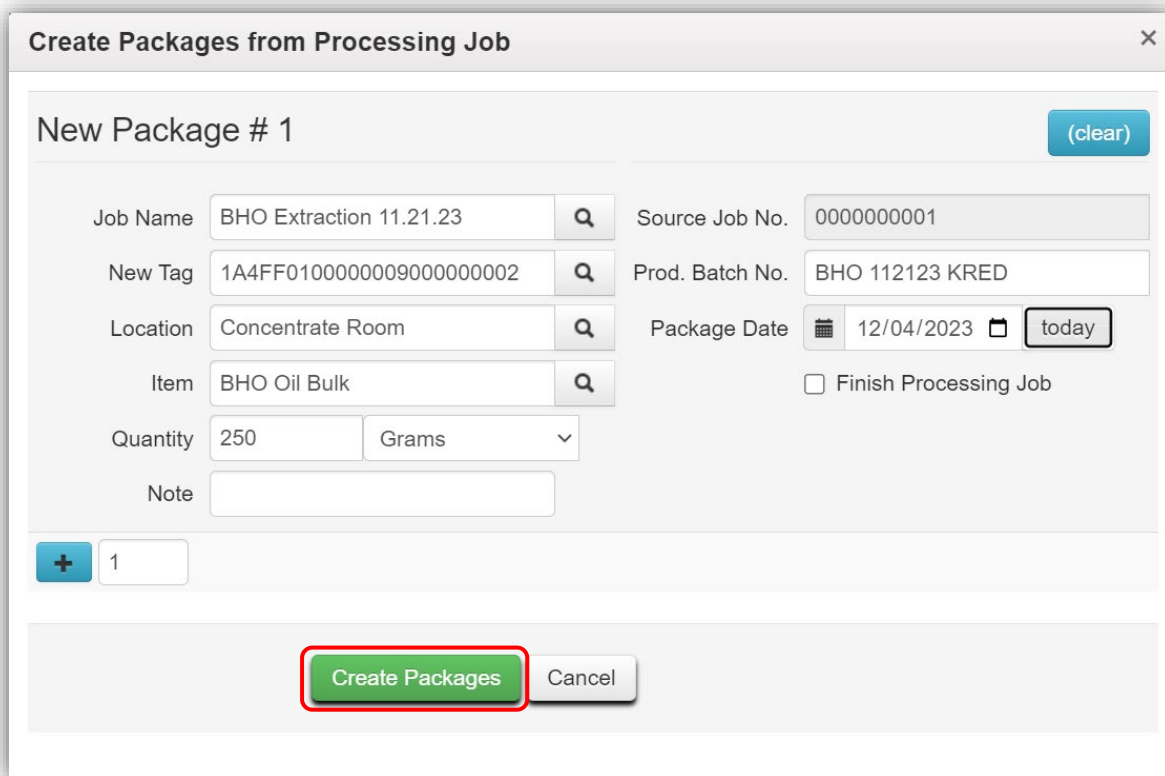
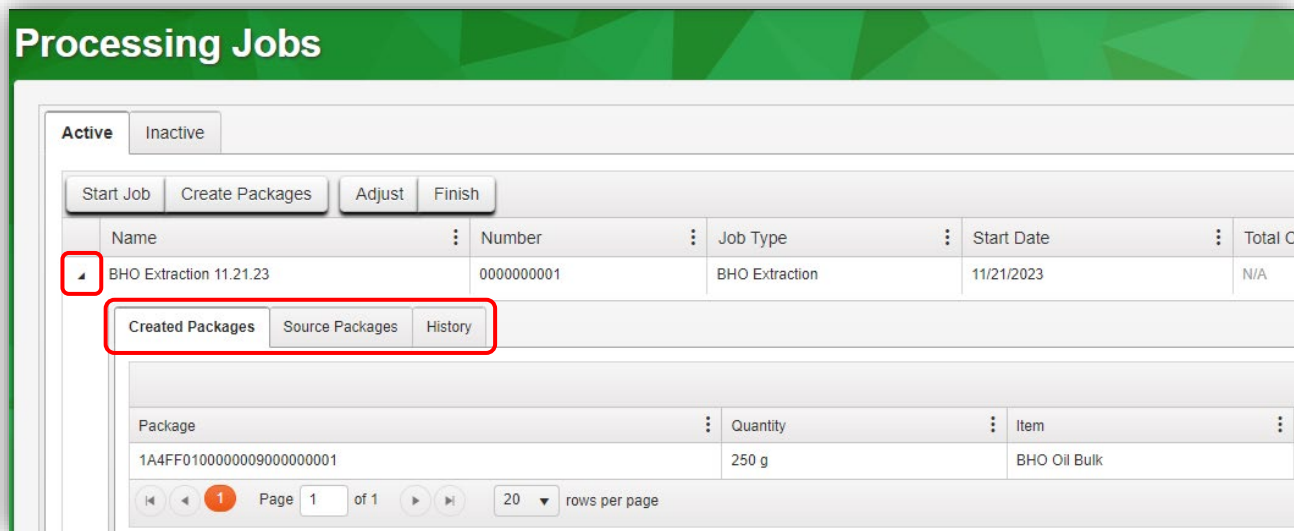


Figure 14: Create packages from Processing Jobs

Notes:

Information on the Created Packages, Source Packages, and History for each Processing Job are available through their drill-down arrow – see **Figure 15**.

- The Created Packages tab shows all packages that have been pulled and created from the associated Processing Job.
- The Source Packages tab shows all original packages that have been used as inputs to create the current Processing Job.
- The History tab shows a complete list of all activity regarding this Processing Job.



Processing Jobs

Active Inactive

Start Job Create Packages Adjust Finish

| Name | Number | Job Type | Start Date | Total C |
|-------------------------|------------|----------------|------------|---------|
| BHO Extraction 11.21.23 | 0000000001 | BHO Extraction | 11/21/2023 | N/A |

Created Packages Source Packages History

| Package | Quantity | Item |
|--------------------------|----------|--------------|
| 1A4FF0100000009000000001 | 250 g | BHO Oil Bulk |

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Figure 15: Accessing Processing Job information

Finishing Processing Jobs

When no additional Production Batch Packages can be produced from a Processing Job, the user needs to finish the Processing Job and record the amount of material waste. This waste should be the byproduct used in the Processing Job. In this example, it was raw plant material that was used for extraction.

- Go to the Processing Jobs grid found in the Packages drop-down on the Navigational Toolbar. Select the Active tab, highlight the Processing Job to finish, then select the Finish button – **see Figure 16.**

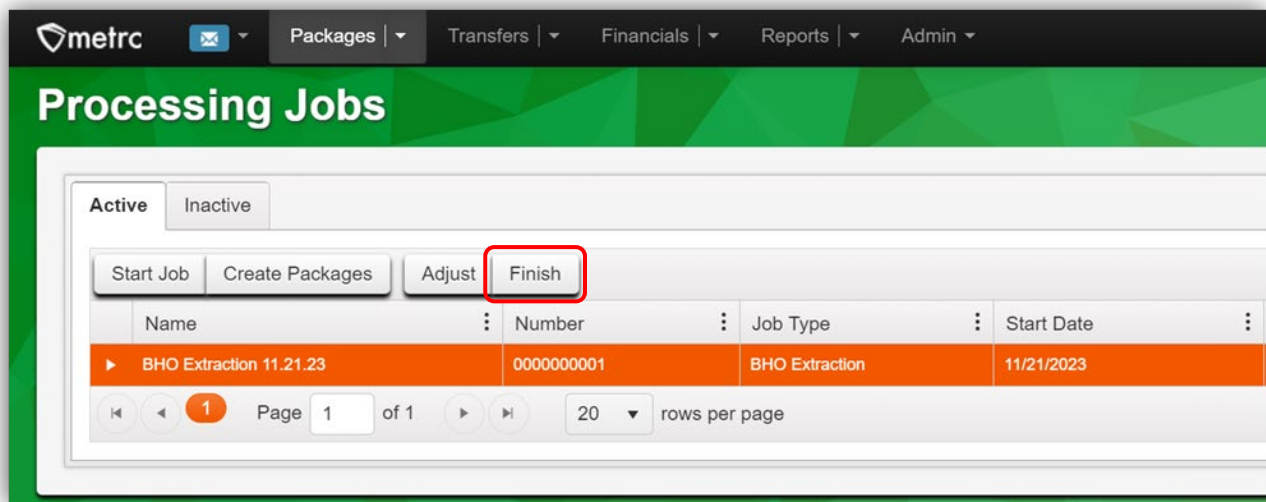


Figure 16: Finish a Processing Job

- Complete the following required fields in the Finish Processing Job action window.
 - Date Finished
 - Waste Weight
 - Note
- Click the green Finish Processing Job button to complete – **see Figure 17.**

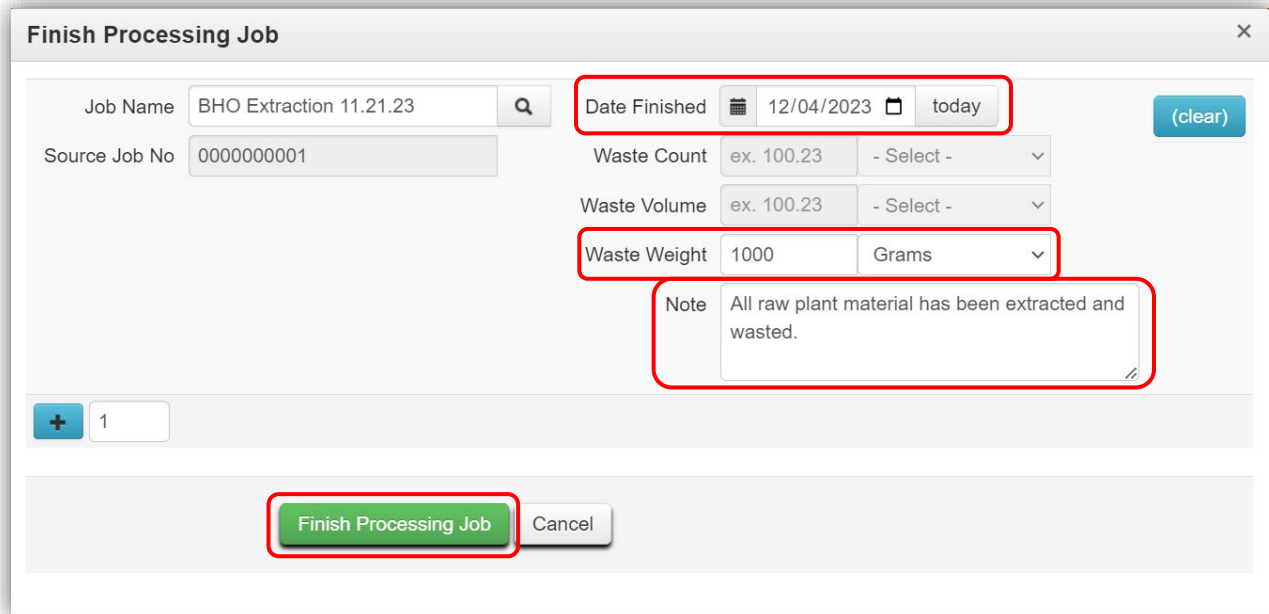


Figure 17: Finish Processing Job action window

Unfinish Processing Jobs

Like with Harvest Batches, if a licensee finishes a Processing Job prematurely, the user has the option to unfinish the Processing Job and make additional changes.

- Go to the Processing Jobs grid found in the Packages drop-down on the Navigational Toolbar. Select the Inactive tab, highlight the Processing Job to unfinish, and then select the Unfinish button to access the Unfinish Processing Job action window – **see Figure 18.**

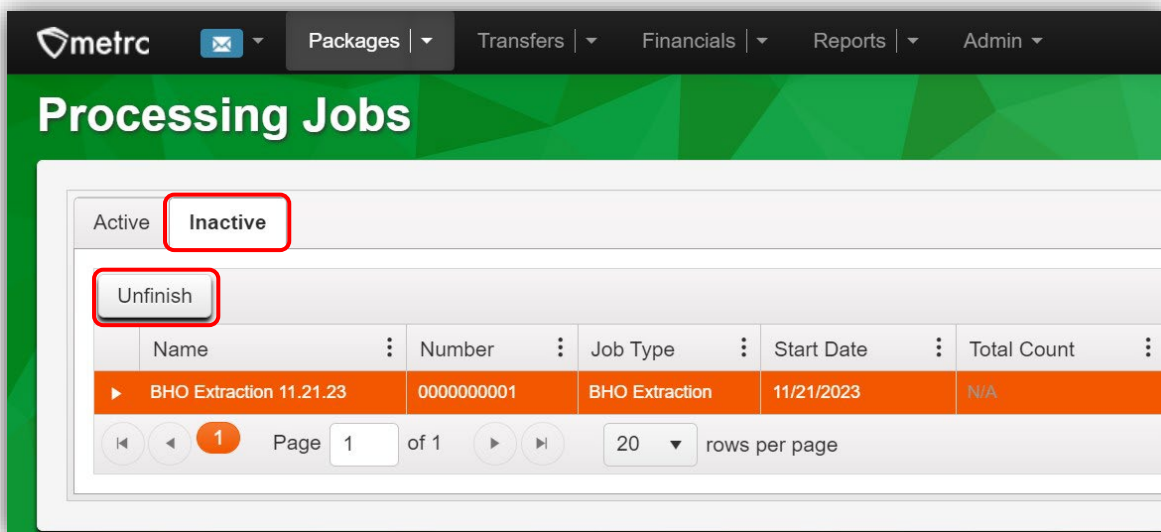


Figure 18: Accessing Unfinish Processing Job

- To complete the unfinish processing job process, click the green Unfinish Processing Job button in the action window – **see Figure 19.**

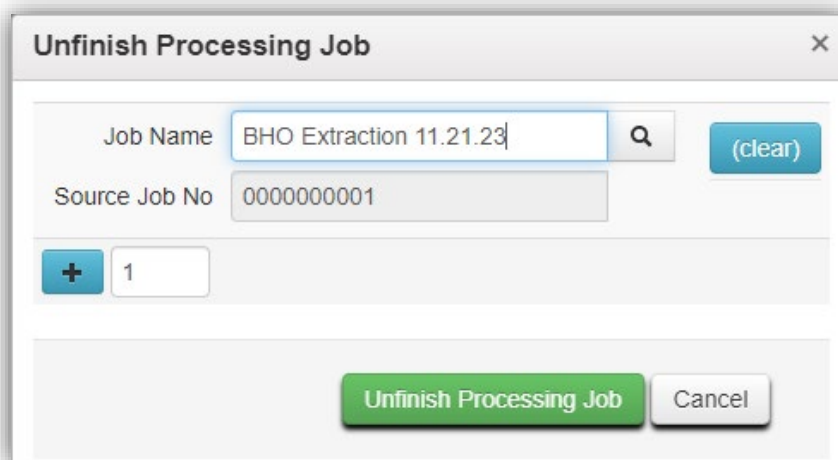


Figure 19: Unfinish Processing Job action window

CCD Approved Categories and Attributes

The CCD has defined and approved the following list of processing jobs Categories and Attributes.

Categories and Attributes

| | |
|-------------------------------|--|
| Extraction of cannabinoids | When the outputs' weights are less than the inputs' weights. |
| Incorporation of cannabinoids | When the outputs' weights are greater than or equal to the sum of the inputs' weights. |

Attributes: Attributes are utilized to describe the production process.

| |
|---|
| Same day process |
| 1-Day process |
| 2-Day process |
| 3-Day process |
| 4 to 6-day process |
| 7 to 14-day process |
| 14 to 21-day process |
| Over 21-day process |
| Outputs are an intermediate product meant to be further processed into concentrate/extract. |
| Outputs are a Marijuana-infused product meant for oral consumption or intended to be an ingredient in a MIP intended for oral consumption. |
| Outputs are a Marijuana-infused products meant for means other than oral consumption or intended to be an ingredient in a MIP intended for means other than oral consumption. |
| Process uses solvent-based extraction. (Hydrocarbon solvents, Oxygenated solvents, Halogenated solvents). |
| Process uses non-solvent-based extraction. (water, ice, dry ice, a press, sieve, or filter). |
| Process uses supercritical/subcritical CO2 extraction. (CO2) |
| Process is adding test-passed concentrate to test-passed biomass to create a new concentrate product that will require retesting (moon rocks, infused prerolls) |
| Process is adding test-passed biomass to another test-passed biomass to create a mixed blend that will require retesting. (House blends) |

Metrc Resources

If you have any questions or need additional support, the following resources are available:

Contact Metrc Support: Email Support@metrc.com or call 877-566-6506

Metrc Learn: Metrc Learn is designed to offer educational opportunities to enhance users' skills with the Metrc system and provides various training options based on experience level. In addition, the learning system is organized into facility-specific programs made up of various courses. To login, visit [Metrc Learn](#) and enter your login credentials, or to access, register by visiting the [Metrc Learn Registration](#).

Access additional resources: In the Metrc system, click on the "Support" dropdown in the top-right navigational toolbar and select the appropriate resource, including educational guides, manuals, and more.

Thank you for your continued partnership.