

Bulletin Number: MA_IB_0082 R&D Testing	Distribution Date: 08/26/2024	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Best practices for R&D Testing	
Reason: Providing guidance on best practices for creating R&D Test Samples.		

Greetings,

Metrc and the CCC are pleased to bring you best practices in Metrc regarding Research and Development (R&D) testing. This bulletin is intended to clarify the process for creating and submitting R&D test samples and to update how R&D Testing will be handled.

Best Practice for R&D Testing

R&D Test samples must be created from the correct source package and transferred from the license where the source package is located. Also, all R&D Test sample packages must be created using the “Submit for Testing” button.

Please follow the process below when creating an R&D test sample:

When creating an R&D Test sample of Raw Plant Material:

1. Create the R&D test sample package using the “Submit for Testing” button. The item name for the test sample must be identical to the source package that the test sample is being pulled from.
2. See below for step-by-step instructions on creating an R&D test sample in Metrc.

When creating an R&D Test sample of a Production Batch of Concentrate, Extract, Infused Edible, or Infused Non-Edible:

1. Create the R&D test sample package using the “Submit for Testing” button. The item name for the test sample must be identical to the source production batch package the sample is being pulled from.
2. See below for step-by-step instructions on creating an R&D test sample in Metrc.

Please note: R&D Testing is a licensed business’ decision. R&D Testing is not counted as part of required compliance testing. It is considered informational only and therefore, the status for the source package will not be overridden.

Creating a Test Sample

When creating a test sample, first select the source package that was sampled from, then click the “Submit for Testing” button - **see Figure 1**. This is the same process for all test samples being created for testing. The correct lab test batch(es) should be selected for that single test sample based on the product being sampled.

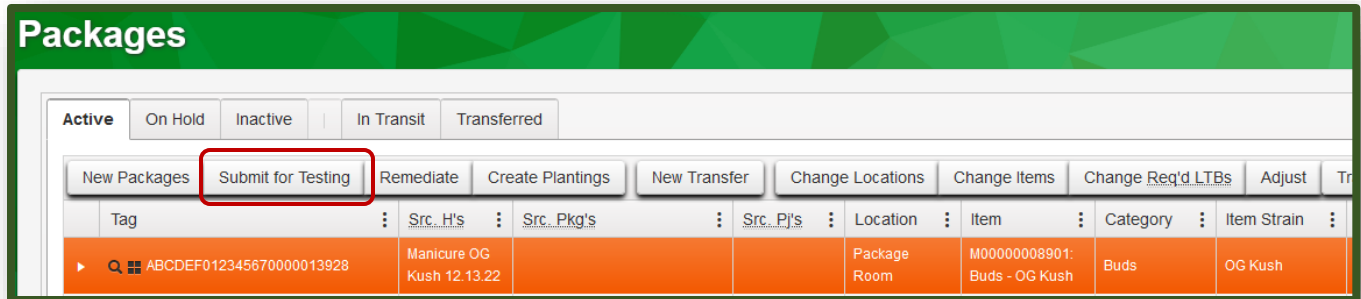


Figure 1: Select Source Package & Submit for Testing button to create a Test Sample

This will open the Submit for Testing action window where the test sample package should be created. Enter the required information including:

- New test sample package tag number
- Location
- Item name
- Quantity
- Unit of measure
- Package date
 - **Note:** The “Same Item” checkbox can be utilized instead of entering the item name to save time when creating the test sample in Metrc.

The next step is the selection of the Required Testing Lab Test Batch. In this step, check the R&D Testing box(es) that matches the product type of the source package and all R&D testing being done. This will indicate to the Testing Facility which R&D Testing is required for the test sample. In the example below, an “OG Kush Buds” test sample package is created to be tested. The Lab Test Batch of “R&D Testing - Microbials” and “R&D Testing – Terpenes (Raw Plant Material * Concentrate)” are selected – **see Figure 2 below**.

Submit for Testing

New Package Sample # 1 (clear)

New Tag: ABCDEF012345670000013927

Location: Package Room

Same Item

Quantity: 12.3 Grams

Package Date: 08/24/2024

Package # 1: ABCDEF012345670000013928

Item: M00000008901: Buds - OG Kush

Current Lab Testing State: Not Submitted

Quantity: 12.3 Grams

Quick Entry: OFF

Required Testing:

- Immature Plants
- Infused Edible
- Infused Non-Edible
- Inhalable Concentrate
- Non-Solvent Concentrate
- R&D Testing - Metals
- R&D Testing - Microbials
- R&D Testing - Mycotoxins
- R&D Testing - Pesticides
- R&D Testing - Potency (Infused Products)
- R&D Testing - Potency (Raw Plant Material & Concentrate)
- R&D Testing - Residual Solvents
- R&D Testing - Terpenes (Infused Products)
- R&D Testing - Terpenes (Raw Plant Material & Concentrate)
- R&D Testing - Viroids
- R&D Testing - Vitamin E Acetate
- Raw Plant Material
- Raw Plant Material (For Extraction Only)
- Retest
- Solvent Based Concentrate
- Tissue Culture - Growth Soil/Medium
- Tissue Culture - Mother Plant
- Tissue Culture - Non-Public Water
- Tissue Culture - Public Water
- Vape Product - Final Form
- Vitamin E Acetate

1

Creating Sample Packages immediately locks out the source Package(s) by setting the Testing State to SubmittedForTesting.

Submit for Testing Cancel

Figure 2: Select Required Test for Package Based on Item Type

In the example below, a “Brownies 40mg” test sample is created to be tested for R&D Potency to check that the product is the targeted potency. The Lab Test Batch of “R&D Testing – Potency (Infused Products)” is selected.

The screenshot shows a software window titled "Submit for Testing" with a sub-header "New Package Sample # 1". The window contains several input fields and a list of testing options. A red arrow points to the "R&D Testing - Potency (Infused Products)" option in the "Required Testing" list, which is currently selected with a checkmark. Other options in the list include "Immature Plants", "Infused Edible", "Infused Non-Edible", "Inhalable Concentrate", "Non-Solvent Concentrate", "R&D Testing - Metals", "R&D Testing - Microbials", "R&D Testing - Mycotoxins", "R&D Testing - Pesticides", "R&D Testing - Potency (Raw Plant Material & Concentrate)", "R&D Testing - Residual Solvents", "R&D Testing - Terpenes (Infused Products)", "R&D Testing - Terpenes (Raw Plant Material & Concentrate)", "R&D Testing - Viroids", "R&D Testing - Vitamin E Acetate", "Raw Plant Material", "Raw Plant Material (For Extraction Only)", "Retest", "Solvent Based Concentrate", "Tissue Culture - Growth Soil/Medium", "Tissue Culture - Mother Plant", "Tissue Culture - Non-Public Water", "Tissue Culture - Public Water", "Vape Product - Final Form", and "Vitamin E Acetate".

Figure 3: Selecting Required Test for Infused Edible Test Samples

Important reminders:

- Select only the Lab Test Batch(es) that correlates with the product type that is being tested including state required testing when applicable.
- If the incorrect Lab Test Batch is chosen and the testing facility receives the sample, the product will be locked with a status of Testing in Progress once all test results have been entered by the Testing Facility. If this happens, please contact Metric Support for next steps.
- If a test sample is created incorrectly, it needs to be discontinued. If the incorrect test sample is not discontinued, the product will be locked with a test status of Testing in Progress once all test results have been entered by the Testing Facility.
- Also, if a test sample is created incorrectly and it is adjusted to zero and finished, then the product will be locked with a test status of Testing in Progress once all test results have been entered by the Testing Facility.

If there are source packages in the Active Packages inventory that are locked after all test results have been entered, please contact Metric Support with the source package and test sample information to see how to get your product unlocked.

To reference additional guidance on Lab Test Batches, please review [Bulletin 49: Lab Test Batch Guidelines update](#).

Metrc resources

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

Contact Metrc Support

By using the new full-service system by navigating to Support.Metrc.com, or from the Metrc System, click Support on the navigational toolbar and click support.metrc.com to redirect to the portal.

Please note: If accessing the portal for the first time, a username (which is established when logging in), the respective state and “Facility license number”, and a valid email to set a password are required.

Metrc Learn

Metrc Learn has been redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Accessing the new [Metrc Learn](#) LMS is simple through multiple convenient locations:

From within the Metrc system

Navigate to the Support area on the navigational toolbar and select “Sign up for Training” to register option from the dropdown.

From the Metrc website

Navigate to your [state’s partner page](#) and scroll down to the “Metrc’s Training Resources” section to find the link.

Also, save the link – *learn.metrc.com* – as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

Access additional resources

In the Metrc system, click on the Support area on the navigational toolbar and select the appropriate resource, including educational guides, manual, and more from the dropdown.

Thank you for your continued partnership.