

Bulletin Number: MT_IB_0061	Distribution Date: 07/07/2025	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Lab Testing Best Practices and Common Errors	
Reason: Metrc is providing information about the functionality surrounding testing.		

Greetings,

Metrc, in conjunction with the Montana CCD, would like to provide guidance on best practices for documenting lab testing in Metrc. Included in this bulletin are helpful tips and resources regarding:

- Creating a test Sample
- Common testing errors and their solutions
- Required Lab Test Batches in Montana

In addition to the information below, please take our [Understanding Common Errors in Testing](#) training available in Metrc Learn for additional insights on ways to avoid errors.

Please read on for more information.

How to Create Test Sample Packages for Testing

To create a test sample package, go to the Packages area on the navigational toolbar and select the Packages option from the dropdown – **see Figure 1.**

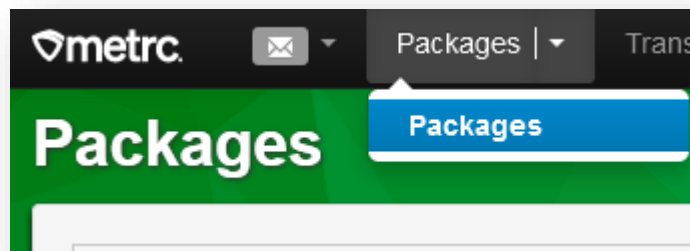


Figure 1: Packages option from dropdown on navigational toolbar

Once on the Packages grid, select the Active tab, then locate and click on the Source Package sampled by the testing facility to highlight it in orange and click the Submit for Testing button – **see Figure 2.**

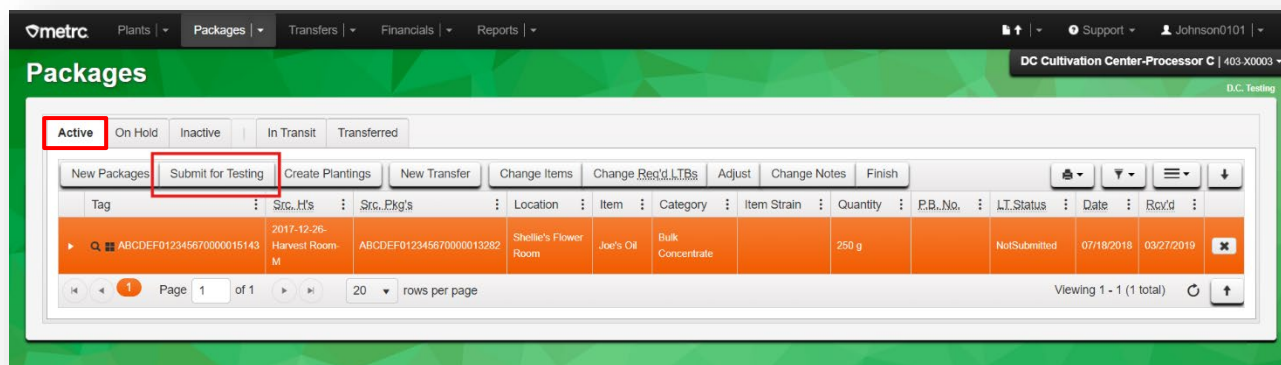


Figure 2: Select Package and Submit for Testing Button to Create a Test Sample

This will open the Submit for Testing action window. The Package sampled by the testing facility is populated on the right-hand side in Package #1 field as the source package. Enter the representative sample amount obtained by the testing facility in the Quantity field for Package #1. **Do not enter the entire contents of the source package in the Quantity field as this will empty the package.** The remaining quantity in Package #1 after sampling displays below the Quantity field.

Assign a new Package Tag to the test sample package being created on the left-hand side. **Note:** Provide the whole physical tag to the testing facility – one portion will be

attached to the physical container of the test sample that was created and the other portion may be used on the Testing Facility's Chain of Custody or internal paperwork.

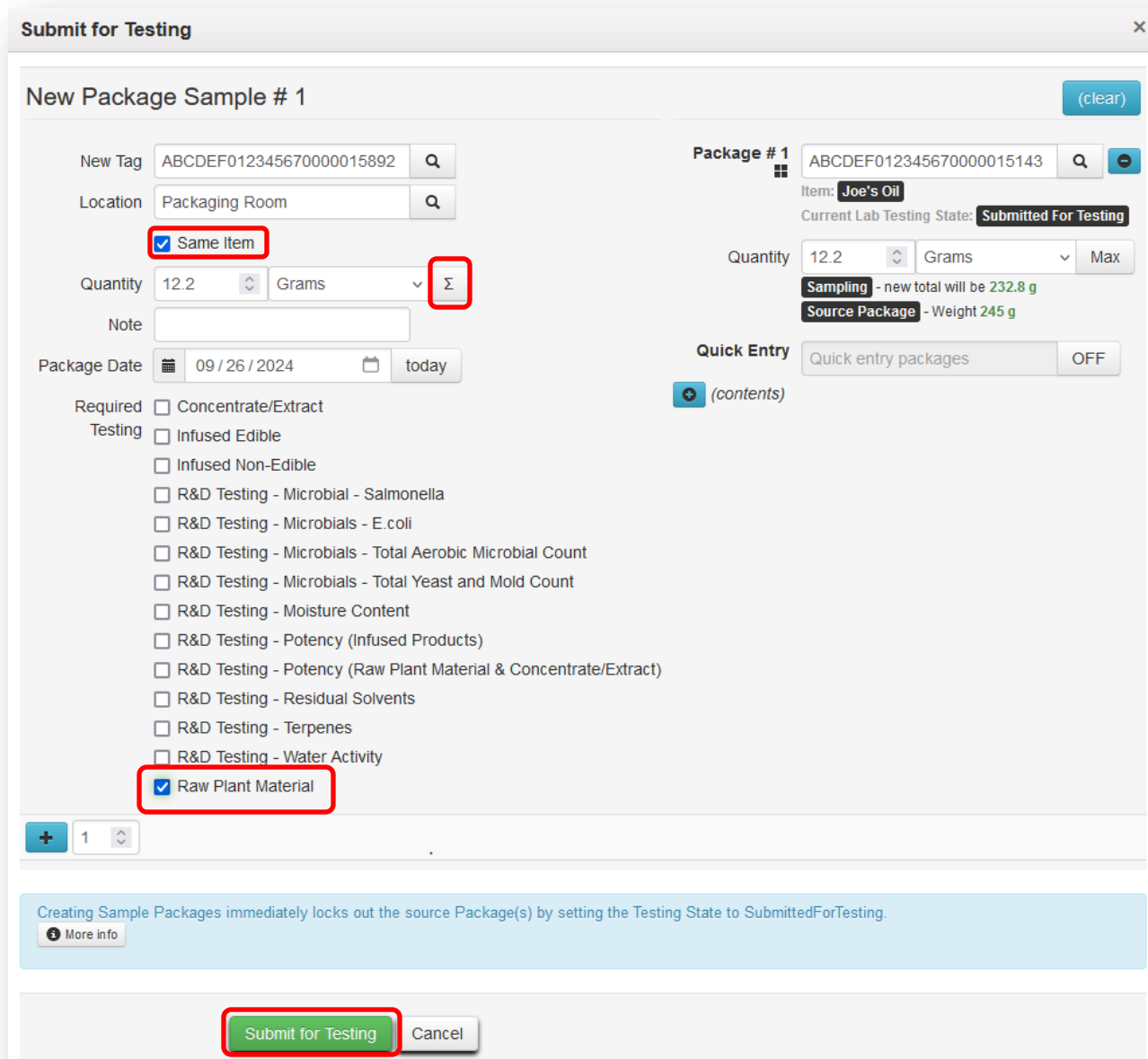
By selecting the "Same Item" checkbox, this will assign the same item name as is associated with the source package.

Then select the appropriate Unit of Measure and the Sum button (Σ) is used to populate the same quantity that is being pulled from the source package as the quantity of the new test sample package. Both the test sample package Quantity and the source package Quantity in the action window should be the same amount and unit of measure that was physically taken by the testing facility.

Enter the date the test sample package is being created in the Package Date field by selecting the "Today" button.

Select the appropriate Lab Test Batch from the Required Testing menu for the product being tested (see below for a list of Lab Test Batches).

After verifying the accuracy of all entries, click the Submit for Testing button— **see Figure 3 below.**



Submit for Testing

New Package Sample # 1 (clear)

New Tag: ABCDEF012345670000015892

Location: Packaging Room

☒ Same Item

Quantity: 12.2 Grams Σ

Note:

Package Date: 09/26/2024 today

Required Testing:

- ☐ Concentrate/Extract
- ☐ Infused Edible
- ☐ Infused Non-Edible
- ☐ R&D Testing - Microbial - Salmonella
- ☐ R&D Testing - Microbials - E.coli
- ☐ R&D Testing - Microbials - Total Aerobic Microbial Count
- ☐ R&D Testing - Microbials - Total Yeast and Mold Count
- ☐ R&D Testing - Moisture Content
- ☐ R&D Testing - Potency (Infused Products)
- ☐ R&D Testing - Potency (Raw Plant Material & Concentrate/Extract)
- ☐ R&D Testing - Residual Solvents
- ☐ R&D Testing - Terpenes
- ☐ R&D Testing - Water Activity
- ☒ Raw Plant Material

Package # 1: ABCDEF012345670000015143

Item: Joe's Oil

Current Lab Testing State: Submitted For Testing

Quantity: 12.2 Grams Max

Sampling: - new total will be 232.8 g

Source Package: - Weight 245 g

Quick Entry: Quick entry packages OFF

(contents)

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

More info

Submit for Testing Cancel

Figure 3: Submit for Testing Action Window

The test sample that has been created, as well as the source package, will have the Lab Test Status of “Submitted For Testing” until the testing facility uploads the test results. The test sample package, indicated by the teardrop icon, can now be added to a new transfer to the testing facility. If the source package’s lab test status does not update to either “Test Passed” or “Test Failed” after test results are uploaded, contact Metrc Support for assistance – **see Figure 4 below.**

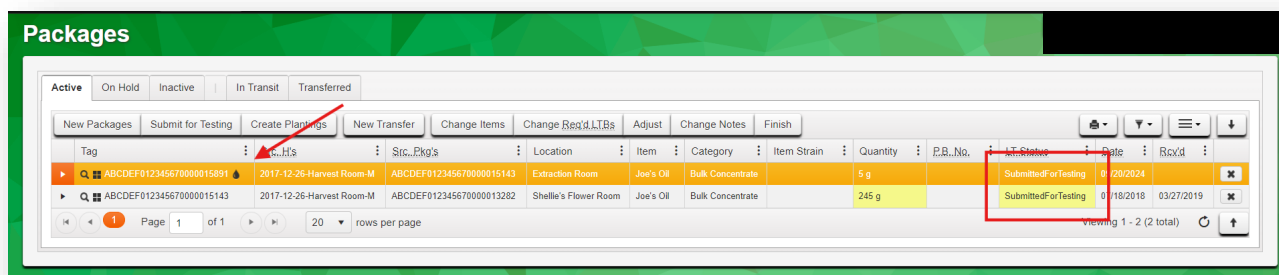


Figure 4: Submit for Testing Test Status

Common Errors and How to Correct

When errors are made during test sample package creation, the ability to move the products can be impacted, even if the product passed state required testing.

Below are some of the most common errors made and actions that can be taken to correct them.

Error – Example 1:

Creating Multiple Test Sample Packages from the Same Package

Only one state required test sample package should be created from a package. Having more than one test sample package can cause the Lab Test Status of a package to be set to 'Testing In Progress' after the testing facility has recorded the test results on the tested sample, preventing the ability to move the product.

Corrective action:

If a duplicate test sample package is in the license's inventory and the test results have been recorded (Lab Test Status is 'Testing in Progress'), contact Metrc Support for assistance.

If a duplicate test sample package remains in the license's inventory AND the test results have not yet been recorded on the sample package transferred to the testing facility (Lab Test Status is 'Submitted for Testing'), the duplicate test sample package should be **discontinued**. DO NOT adjust the duplicate test sample package to zero or finish the package as this will guarantee the product will be locked in the 'Testing In Progress' status after all test results have been entered.

Error – Example 2:

Creating a Child Package from the Source Package Prior to the Testing Facility Entering/Uploading Electronic Results in Metrc

You should not create any child packages from a source package until the testing facility

has entered the test results and the COA has been uploaded in Metrc. Once the test results for the source package are recorded and the Lab Test Status is set to 'TestPassed' or 'Retest Passed', a child package can be created, which will inherit the test results of the parent package.

Note: DO NOT create a child package and then pull a test sample from the child package. The test sample should only be pulled from a source package.

Corrective action:

If the error is discovered prior to transferring the samples to the testing facility, the test sample taken from the child package can be discontinued. If the samples have already been transferred to the testing facility, please contact Metrc Support for assistance.

Error – Example 3:

Pulling from a Test Sample Package to Create a Test Sample Package

Creating a package from a test sample package creates a second test sample package. After the testing facility has recorded the test results and uploaded the COA on one of the samples, the Lab Test Status of the original source package that will display on the Packages grid will be Testing in Progress.

Corrective action:

If the error is discovered prior to transferring the samples to the testing facility, the test sample taken from the sample package can be discontinued. If the samples have already been transferred to the testing facility, please contact Metrc Support for assistance.

Error – Example 4:

Pulling the Entire Contents of the Source Package into the Test Sample Package

A test sample should be created with a quantity matching the amount sampled. Verify the new quantity of the source package when creating the test sample package before clicking the Submit for Testing button. It should not be zero.

Corrective action:

Please contact Metrc Support for assistance.

Required Lab Test Batch guidance

Metrc has configured the available Lab Test Batches to include tests for all required testing for a particular product category. Please reference the following chart for guidance when making this selection during Test Sample package creation – **see tables below**.

Production Stage/Product	Product Category in Metrology	Lab Test Batch & Required Testing
Raw Plant Material	Raw Plant Material Buds Buds (Bulk) Buds (Micro Grow) Buds – State Sample Shake/Trim Shake/Trim (Bulk) Shake/Trim (by strain) Shake/Trim (by Strain) (Micro Grow) Shake/Trim (Micro Grow) Pre-roll Pre-roll (Micro Grow) Wet Whole Plant	Raw Plant Material Raw Plant Material Raw Plant Material Choose from the following options: <ul style="list-style-type: none"> • Non-Solvent Concentrate/Extract (For Processing) • Non-Solvent Concentrate/Extract (Final Form) • Solvent Based Concentrate/Extract (For Further Processing) • Solvent Based Concentrate/Extract (Final Form)
Concentrate/Extract	Concentrate/Extract Concentrate Concentrate (Bulk) Concentrate (Micro Grow) Concentrate – State Sample Ingestible Concentrate Ingestible Concentrate (Fluid) Joint Joint (Micro Grow) Kief Kief (Micro Grow)	

Production Stage/Product	Product Category in Metric	Required Testing
Infused Products	Infused Products Infused Edible Infused Edible (Micro Grow) Infused (edible) – State Sample	Infused Products
	Infused (non-edible) Infused (non-edible) (Micro Grow) Infused (non-edible) – State Sample	Infused Products

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](https://support.metrc.com), or from the Metrc System, click Support and navigate to support.metrc.com and it will 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.

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 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 dropdown on the navigational toolbar and select the appropriate resource, including educational guides, manuals, and more.

Thank you for your continued partnership.