Welcome to Metrc

New York Cultivators Webinar – December 10, 2025

Thank you for joining us today!

Meet the Metrc team

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Customer Success

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Customer Success

Agenda

1   **Metrc New York implementation**

2   **License specific guidance**

3   **API integrations and resources**

4   **Q&A**

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Implementation plan

Key milestones for your licensed facility type

metrc.

Cultivation timeline & milestones

Available since November 7th – Tips and reminders.

1

Register for Metrc
Learn and complete
**New Business
Fundamentals**

2

Receive and validate
log in credentials from
Metrc by logging in

3

Admin sets up Metrc
account

4

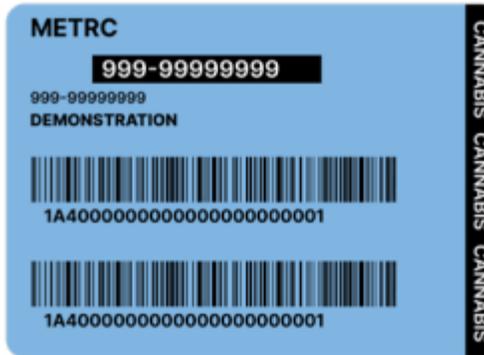Start conducting
Beginning Inventory
process

Inventory tracking

Overview

metrc.

Metrc tracked inventory

For licensed business operating in New York, there are three types of tracked inventory in Metrc.

Plants

Packages

Retail Items
(individual units)

Each type includes a unique identifier (UID), which is made up of a unique set of numbers and letters, that identifies individual plants, packages, or product units in the Metrc system for compliance, transparency, and traceability.

Metrc tracked inventory

Plant, Package, and Retail Item identifiers do not expire.

Type	Description	Use case	Cost	Who can order
Plant UID	A UID printed on a tracking tag and affixed to an individual plant with a plant strap. Each tracking tag has a Radio Frequency Identification (RFID) inlay that passively emits a signal to identify each plant in your cultivation facility. **Use of third-party RFID solutions is optional.**	When a plant reaches the vegetative stage, the plant UID is attached. This same UID stays on the plant until it's harvested.	$0.10 per UID	Cultivators
Package UID	A UID printed on a tracking tag and affixed to identify all bulk cannabis related inventory such as lots and wholesale packages. This tracking tag is adhered like a sticker to the physical package. Each tracking tag has a Radio Frequency Identification (RFID) inlay that passively emits a signal to identify each package in your facility.	Package UIDs are assigned to any usable cannabis material including bulk, work-in-progress, lab samples, trade samples, and finished goods.	$0.10 per UID	All licenses
Retail Item UID	A UID that businesses will print and affix on individual finished goods. The Retail Item UID is generated as a QR code and assigned to each individual final retail item to track through retail sale.	All cannabis products transferred to retail-facing facilities must be designated as a Finished Good package with a Retail Item UID printed and applied to each unit in the batch package before transfer to distributors.	$0.10 per UID	Processors Distributors (opens Feb. 1 for transition period only)

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New York UID credit process per OCM

Metrc applied an allotment credit to Plant UID, Package UID, or Retail Item IDs for select license types.

License Type	Plant UIDs	Package UIDs	Retail Item IDs (Individual units)
Cultivator	2,500	--	--
Processor	--	--	2,500
Distributor	--	750	--
Registered Organization	--	--	3,250
Microbusiness	--	--	750

- You must be credentialed and have your business set up to order your Plant or Package allotment or access your auto-credited Retail Item ID allotment.

- If you received an allotment credit, your Admin received an email from *noreply@metrc.com*

- These <u>do not expire</u> and can be used at any time.

- When the allotment has been exhausted, licensees must purchase by ordering in the Metrc system.

Please reach out to Metrc Support if you have questions related to these credits.

License specific guidance

Cultivators

Beginning inventory

Closes on December 17

Please reference the Beginning Inventory Guide received after credentialing for more details.

ⵁmetrc.

Start ordering Plant and Package UIDs

Beginning Inventory deadline – December 17

All existing plants and packages must be physically tagged with Plant or Package UIDs and recorded in the Metrc system.

- Each individual vegetative and flowering plant must be tagged with Plant UIDs. Any immature plant must be digitally tagged in Metrc with a Plant Batch.

- All packages must have a Package UID on each package.

Harvested plants tip:
Wait until these are in a bulk package for further drying/curing and associate Package UIDs to bulk packages instead of tagging the harvested plants with Plant UIDs.

Ordering Metrc Plant and Package UIDs

All ordering occurs in Metrc.
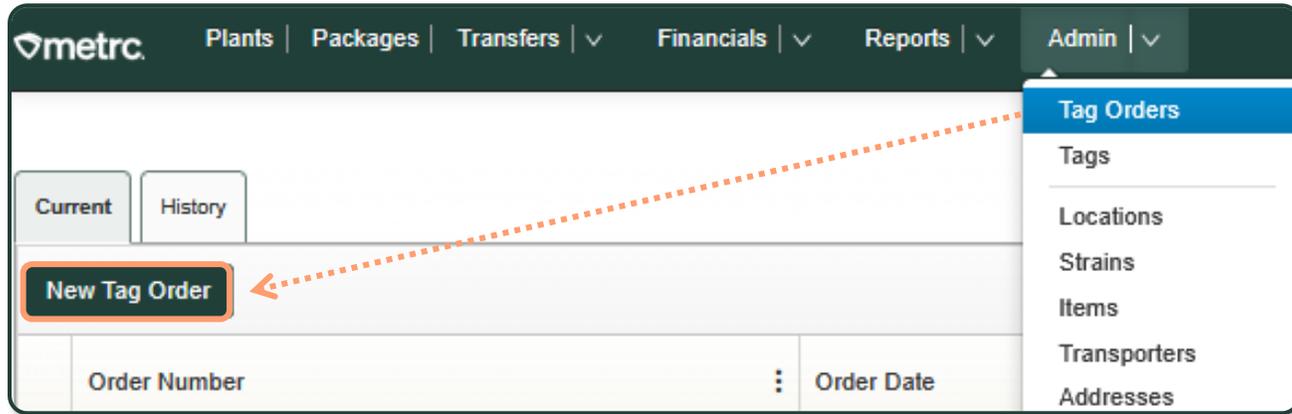
- Place separate orders for each facility as they are programmed for each facility's account individually.

- Make sure that you are in the correct facility within Metrc when you place the order.

- Orders are *not* transferable between facilities.

- All orders are final.

Receiving Metrc Plant and Package UIDs

Be sure to physically receive UIDs before digitally "receiving" them in Metrc.

Admins – Set up business account in Metrc

Beginning Inventory deadline – December 17

Required to complete in Metrc:
- Plant and Package UID orders.
- Adding Employees and employee permissions.

Third-party integrations: All other account setup actions can occur through the Metrc API via third-party systems or completed in Metrc.

Note:
Your API key must be generated in Metrc to use the API to complete these actions.

Adding Employees

Admins should setup employees and system permissions.

Adding employees and setting employee permissions is accessible through the Admin dropdown on the navigational toolbar.

- All Employees information need to be entered and saved.

- Online access does not need to be granted.

- Proper View or Manage permissions should be set based on the user's role.

- Employees and permissions can be added or removed at anytime.

External Incoming Transfers

Beginning Inventory deadline – December 17

External Incoming Transfers

All beginning inventory needs to be brought into your license to ensure your Metrc electronic inventory matches your physical inventory on hand using the two step External Incoming Transfers process.

Both steps must be completed for the tracked packages to be reflected in your Metrc inventory.

This includes all new genetics for beginning inventory.
You will be able to bring in new genetics after the beginning inventory period through a different process.

1 Create External Incoming Transfers

External Incoming Transfers are used to bring in the packaged product for seeds, raw plant material, or packaged products.

Option 1: Third-party systems

Can be completed through the Metrc API via third-party systems to push the initial inventory into the system in batches.

Option 2: Manually in Metrc

Fill in information regarding the Type, Phone Number, Planned Route, Item Name, Quantity, and Packaged Date.

- o Planned Route field should state "Received and weighed at the Licensed Business Number #___. Verified by the Metrc Admin."

New Incoming Transfer

| Type | Beginning Inventory |
| Phone No. | ex. +1-123-456-7890 |

Planned Route

Invoice Number — Enter the Invoice Number
Est. Departure — 10 / 10 / 2025 — today
07 : 51 PM
Est. Arrival — 10 / 10 / 2025 — today
07 : 51 PM

Item For Package # 1 — Type part of the Item name... — (clear)
Package Date — mm / dd / yyyy — today
Quantity — ex. 100.23 — - Select -

+ 1 (package)

Cancel   Register Transfer

2 Receive External Incoming Transfers

Each licensee MUST have package UIDs available to complete this step.

- Once created, you can complete, void, or edit the external transfer.

- Completing the transfer will be when you physically apply the Metrc Package UID that you are assigning during the completion process.

- Once completed this will now be in your Metrc inventory.

Complete Incoming Transfer

Manifest	0000000601	Transfer Type	Beginning Inventory
Origin Lic. No.		Origin Name	
Main Phone No.	1234567890	Mobile Phone No.	

Phone No. for Questions	

Employee ID		Vehicle Make	
Driver's Name		Vehicle Model	
Driver's Lic. No.		License Plate	

| **Package # 1**	ABCFF0300000065000000078	Item	NY Kush Buds	Shipped Qty.	2500.42	g	☐ Reject
Location	Package Vault			Receive Qty.	2500.42	Grams	
Sublocation (Optional)	Type part of the Sublocation nam						

Cancel Complete Transfer

Reminder: When bringing in beginning inventory for any packaged product, the product will come into Metrc as Not Submitted (as a testing status).

Outgoing Licensed Transfers

Beginning Inventory deadline – December 17

Any product leaving your facility at this time must have a Package UID on each bulk package prior to transfer to a processing facility for final packaging.
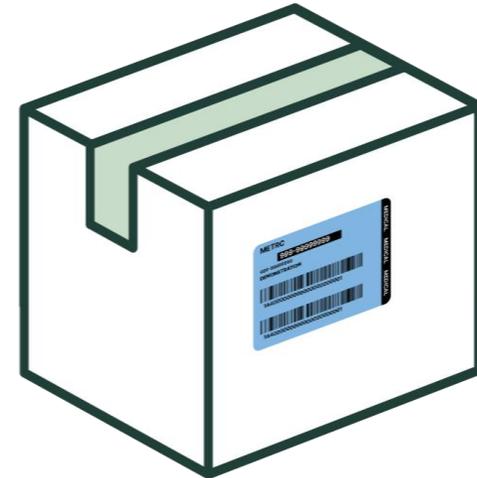
Plant and Package tracking

Plant and Package tracking

Best practices including guidance on properly affixing Plant and Package UIDs.

Immature → **Vegetative** → **Flowering** → **Harvested** → **Packaged**

Plant tracking overview

Plant tracking

Immature plants

Immature plant batches **do not have an individual Plant UID** and instead, are given a plant batch #.

The Immature plants inventory grid offers detailed information.

	Plant Batch	Strain	Location	Sublocation	Type	Hold	Plants	Tracked	Packaged	Destroyed	Source Package	Source Plant	Source Plant Batch	Batch Date
>	MMTest_9.30.25	MMDD HH:MM Test Strain_mm1	Immature Plant Room	Immature Plant Room Rack A Shelf 3	Clone	No	138	10	0	2				09/30/2025

Tabs: Mother Plants | On Hold | Inactive | **Immature** | On Hold | Inactive | Vegetative | Flowering | On Hold | Inactive | Harvested | On Hold | Inactive | Additives | Waste

Buttons: Create Plantings | Create Packages | Split Plantings | Rename | Change Strains | Change Location | Change Growth Phase | Destroy Plants | Record Additives | Record Waste

AU Cultivator | NY-C-X0001

Plant tracking

Vegetative plants

Individual Plant UIDs are assigned and affixed to plants at this stage.

Plant UIDs should be placed at one of the lower branches at the bottom of the stalk up out of the growing material.

The Vegetative plants inventory grid offers detailed information.

Mother Plants	On Hold	Inactive	Immature	On Hold	Inactive	Vegetative	Flowering	On Hold	Inactive	Harvested	On Hold	Inactive	Additives	Waste

Assign Tags | Replace Tags | Change Strains | Change Location | Change Growth Phase | Changes by Location | Destroy | Record Additives | Record Waste | Create Plantings | Manicure

Tag	Strain	Location	Sublocation	Hold	Plant Batch	Plant Batch Type	Plant Batch Date	Phase Date	Harvested
ABCFF0200000065000000018	Gelato	Veg Location A		No	Gelato_21Aug2025_JP	Clone	08/21/2025	08/22/2025	0 times

Plant tracking

Flowering plants

Plant UIDs used from the Vegetative stage should follow each plant into the Flowering stage.

Place Plant UID on a lower branch at the bottom of the stalk but up out of the growing material.

The Flowering plants inventory grid offers detailed information.

| Mother Plants | On Hold | Inactive | Immature | On Hold | Inactive | Vegetative | Flowering | On Hold | Inactive | Harvested | On Hold | Inactive | Additives | Waste |

Replace Tags | Change Strains | Change Location | Change Growth Phase | Changes by Location | Destroy | Record Additives | Record Waste | Create Plantings | Create Immature Plant Packages | Manicure | Harvest

Tag	Strain	Location	Sublocation	Hold	Plant Batch	Plant Batch Type	Plant Batch Date	Phase Date	Harvested
> ABCFF0200000065000000001	Blue Dream	Flower Location A	Flower Room A Row 2	No	Blue Dream_21Aug2025_JP	Clone	08/21/2025	08/22/2025	1 time

Plant tracking

Harvested plants

Harvested plants will go into a Harvest Batch and packaged once dried and cured.

The Harvested plants inventory grid offers detailed information.

	Harvest Batch	Strain	Location	Sublocation	Plants	Wet Wgt.	Waste	Total Pkg'd	Pkg's	Weight	Restored	UoM	Lab Testing	A.H.	Date		
> ✂	Purple Kush 111325	Purple Kush	Harvest Location		3	3,510.38 g	0 g	1,000 g	1	2,510.38 g	0 g	g	NotSubmitted	No	11/13/2025		

Tabs: Mother Plants | On Hold | Inactive | Immature | On Hold | Inactive | Vegetative | Flowering | On Hold | Inactive | **Harvested** | On Hold | Inactive | Additives | Waste

Buttons: Create Packages | Rename | Change Location | Report Waste | Finish | Restore All

Harvesting Plants

Overview

Harvest
Create harvest by cutting down the strain specific plants.

Weigh
The plant in its entirety after being cut down (stem, stalk, bud/flower, fan leaves, trim leaves, etc.).

Waste
Physical waste can be reported as many times as needed but must be reported the day it is created.

Package
Create packages of the dried and cured product (buds or shake/trim) from each harvest.

Transfer
Create transfer manifest to move packaged product to Testing Lab, or Processor.

Finish
When Harvest Batch usable product is completely gone. (All packages are created, and all physical waste is reported).

Harvest tracking

In the Harvest grid, all granular information and associated historical data is captured.

Historical data is easy to view

Plant tracking and Packaging

Harvested plants

Once Harvested plants are ready for transfer. A Package should be created and a Package UID should be used at this stage.

The Create Packages button is used from the Harvested tab.

Harvest tracking

Creating a new Package from a Harvest.

Harvest details captured

Create Packages

Mother Plants	On Hold	Inactive		Immature	On Hold	Inactive		Vegetative	Flowering

Create Packages | Rename | Change Location | Report Waste | Finish | Restore All

Harvest Batch	Strain	Location	Sublocation	Plants
Metrc Biss 9/19/25	Metrc Bliss	Harvest Room		3

New Package # 1

(clear)

Plants	Packages	Lab Results	Waste	**History**

New Tag ABCFF0300000065000000078

Location Packages Vault

Sublocation *(Optional)* Type part of the Sublocation nam

Item Metrc Bliss Flower Bulk

Quantity Calculated | Grams

Note

Package Date 10 / 10 / 2025 | today

☐ Production Batch

Harvest # 1 ✂ Metrc Biss 9/19/25

Quantity 1500 | Grams

Packaging - new total will be **29.8333 g**

➕ (contents)

Description

Harvest "Metrc Biss 9/19/25" created in location "Harvest Room"
- Location Type: "Default Location Type"

Harvested 1,204.28 Grams from Plant ABCFF0200000065000000069

Harvested 1,201.38 Grams from Plant ABCFF0200000065000000070

Harvested 1,198.43 Grams from Plant ABCFF0200000065000000068

Used 1,000 Grams for Package (ABCFF0300000065000000019) of Metrc Bliss Flower Bulk

Used 1,000 Grams for Package (ABCFF0300000065000000066) of Metrc Bliss Flower Bulk

Removed 74.2567 Grams of waste

| Page 1 of 1 | 20 rows per page |

Cancel | Create Packages

Page 1 of 1 | 20 rows per page
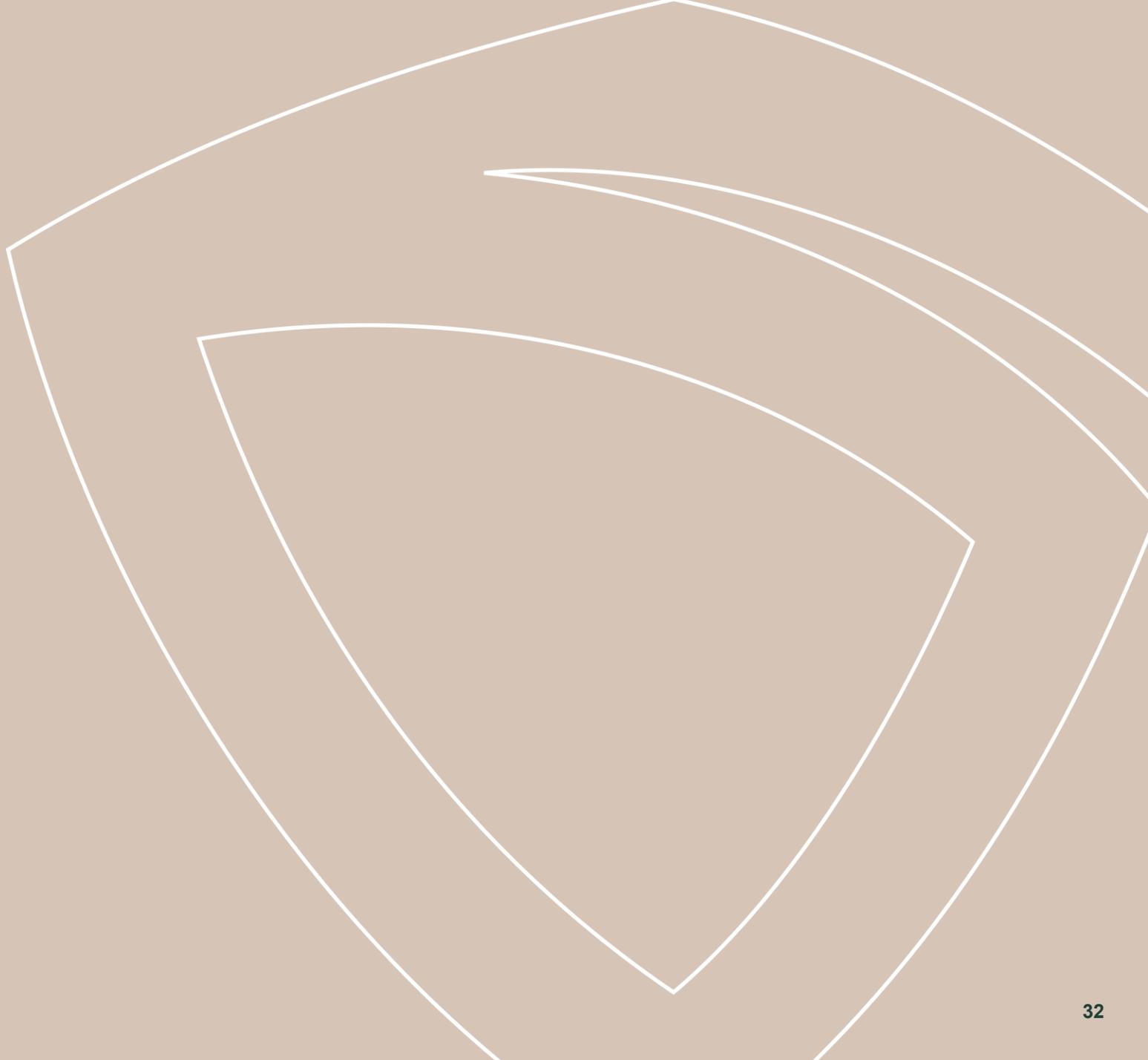
Packages

Package tracking

In the Packages grid, each package has uniquely serialized Package UID numbers.

Active packages include a detailed history including:

- Source harvest

- Source package(s)

- Item

- Category

- Strain

- Quantity

- Package status

- Lab results…and more

Transfers

Transfers

Important reminders

- Incoming External Transfers will be used to bring in initial beginning inventory only. Following the beginning inventory period.

- **External Incoming Transfers will <u>no longer be available</u> for use after December 17, 2025.**

- Transfer Templates available for all license types.

Standard Transfer Types

- *Affiliated* – Business to business transfer for the same affiliated company

- *Wholesale* – Business to business transfer in which there is a wholesale transaction occurring

- *Lab Testing* – Business to independent testing facility conducting compliance testing

Licensed Transfers overview

Metrc system transfers functionality for all New York licensed facilities.

Transfers functionality is available from the Transfers dropdown on the navigational toolbar.
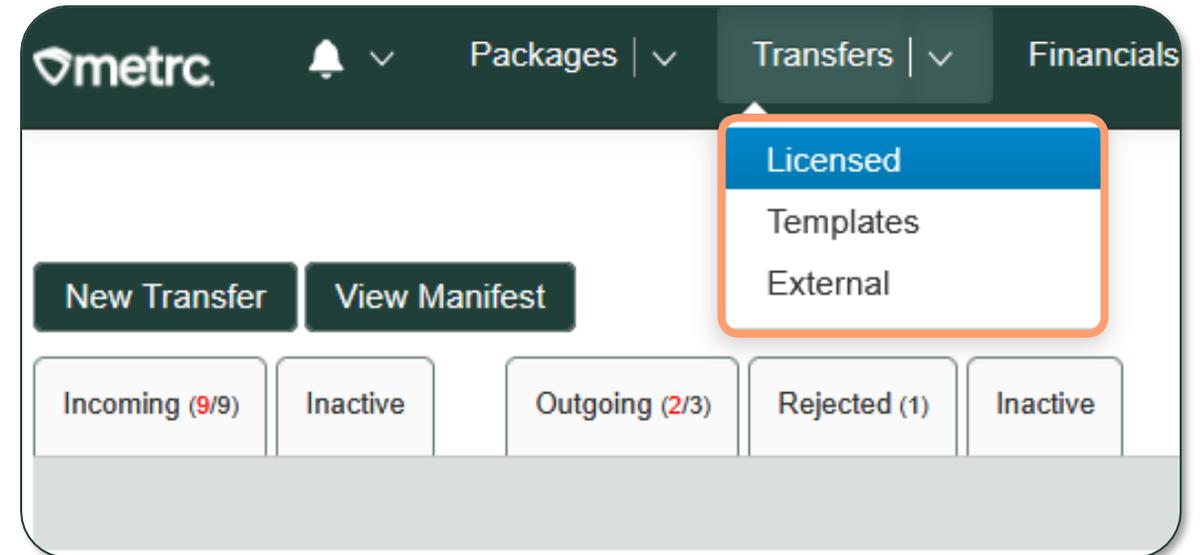
Licensed Transfers overview

Metrc system functionality for licensed transfers in New York.

The Licensed Transfers grid allows you to:

- View a Transfer Manifest

- View and manage transfers that are:

  o Incoming

  o Inactive incoming or outgoing

  o Outgoing

  o Rejected
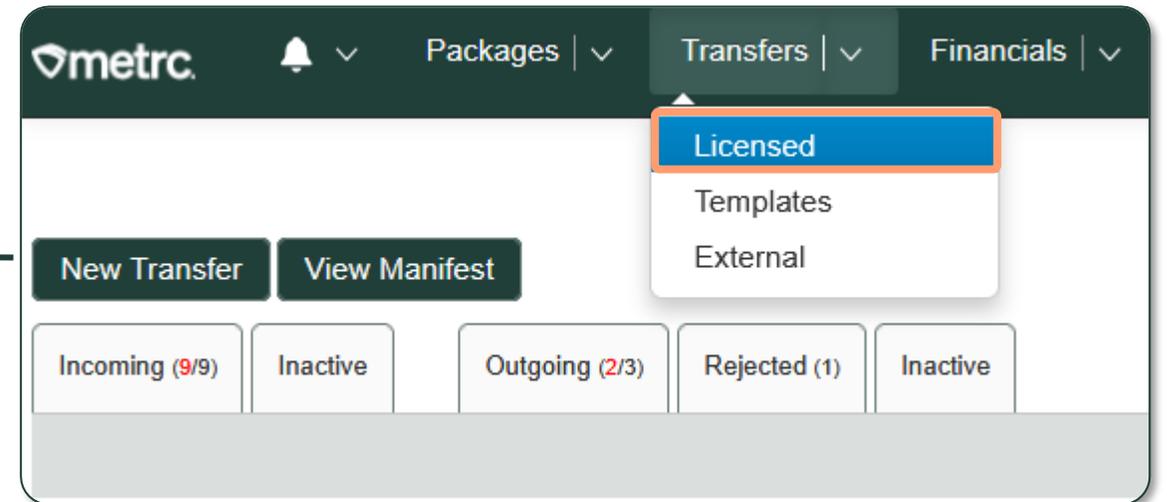
Creating a new Transfer in Metrc

1 Click Transfers dropdown in the navigational toolbar.

2 Select Licensed from the Transfers dropdown.

3 Click the New Transfer button.

4 Complete all required information.

5 When complete, click the Register Transfer button.

Transfer Manifests

View and edit through Transfers area in Metrc.

- Highlight a manifest and click the View Manifest button to display a PDF version.

- The Transfer Manifests page provides the ability to locate and view a Manifest.

- Use the filter functionality to locate the required manifest(s).

Transfer Manifests

View and edit through Transfers area in Metrc.

Click the expand arrow to display: | **Transporter Information** | **Package Information**

Licensed Transfers

Overview and tips for New York licensees.

- ✓ Must be created any time a package moves from one licensed facility to another – *even on the same property*.

- ✓ The destination facility can reject some or all packages.

- ✗ Partial packages cannot be received or rejected.

- ✓ A rejected package will require the originating licensee to return the package back into their inventory.

API connections

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Third-party Integrators in New York

Optional to use based on your business needs.

Metrc.com/validated-integrators/

- Easy to find licensed businesses in Metrc's validated integrators list.

- Search and sorting functionality helps users find what they need quickly and easily.

- **Discuss transition plans with current third-party providers you have!**

Reminder: LIMS integrators must go through the standard integration process. Please coordinate with your provider on the transition plan.

Metrc resources

Metrc resources

A glance at several resources to support your journey with Metrc.

Support

Our dedicated support team is available through phone and online portal access.

- **Phone**: 877-566-6506
- **Online**: Support.metrc.com
- **Available**: M-F, 8 a.m. ET – 10 p.m. ET, Sat. 10 a.m. – 8 p.m. ET, Sun. Voicemail or portal only
- **What to know:** Our team is here to help in your journey with cannabis compliance. We not only have a dedicated team for answering specific questions, but a library of self-help materials for navigating the system.

metrc learn™
Training

On-demand training platform with over 300+ courses right at your fingertips.

- **Access**: Learn.metrc.com or through mobile app: Go Learn
- **Available**: 24/7, 365 days
- **What to know**: Metrc Learn, our on-demand training portal allows for users to create persona-based learning journeys, access over 300 courses and more! Select trainings also include interactive pieces allowing you to practice new skills out of the production environment.

metrc expert™
Metrc Expert

Access support documentation directly in the Metrc system.

- **Access**: Available when you log in to your Metrc instance
- **Available**: 24/7, 365 days
- **What to know**: Metrc Expert is our AI-powered chat tool that allows you to ask questions in the Metrc system as you work in real time without having to spend time sifting through documentation.

Metrc.com

Additional information and resources to supplement your needs are available on Metrc.com

- **Access**: Metrc.com
- **Available**: 24/7, 365 days
- **What to know**: Metrc.com offers additional resources including case studies, blogs, guides, and more! Also, for state specific information, navigate to your state partner page to access bulletin documentation (which can also be found in the support portal).

Licensee resource materials

To ensure you are setup for success, please note the following.

Mandatory Training
- New Business Fundamentals

Whitelist email addresses
- NoReply@metrc.com
- Communications@metrc.com

Check out Metrc Expert!
- Guided walkthroughs
- New Account Checklist

Additional training resources

Admin Training

Beginning Inventory Guide

Creating Beginning Inventory Training

Metrc Learn Training – Cultivation

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Metrc Bulletins

Documentation highlighting product updates or enhancements.

Where can I find bulletins?

Metrc bulletins are posted in two locations:
- Metrc Support Portal
- New York Partner Page on Metrc.com

Leverage Metrc Bulletins to gain knowledge on new product enhancement or updates.

Metrc Support Bulletin

Bulletin Number: NY_IB_0001	Distribution Date: 12/05/2025	Effective Date: Ongoing
Contact Point: Metrc Support	**Subject**: Item Product Chart	
Reason: Metrc provides guidance on item categories and lab test batches.		

Greetings,

Metrc, in conjunction with the New York Office of Cannabis Management (OCM), are pleased to provide bulk and final form item categories, along with our testing chart that shows how to correlate item categories with products and the appropriate lab test batches for testing.

Please read on for additional information.

Page 1: Overview of bulletin contents

Page 2 and beyond: Additional training details, at times including screenshots or directing you to more detailed learning in Metrc Learn.

Metrc Support Bulletin

Bulk Item Categories
Please review the Bulk Item Chart below:
- The left column displays the available item category
- The middle column contains the item type
- The right column displays if that product type requires a strain

Bulk Item Categories

Item Category	Type	Requires Strain
Seeds	Plants	Yes
Immature Plants	Plants	Yes
Hemp – Bulk	Buds	Yes
Hemp Concentrate – Bulk	Concentrate	No
Bud/Flower - Bulk	Buds	Yes
Concentrate/Extract- Bulk	Concentrate	No
Keif – Bulk	Concentrate	No
Infused Flower – Bulk	Buds	Yes
Infused Non-Edible – Bulk	Infused Non Edible	No
Infused Edible – Bulk	Infused Edible	No

Final Form Item Categories
Please review the Final Form Item Chart below:
- The left column displays the BioTrack item category
- The right column contains the corresponding Metrc Item Category

Final Item Categories

Biotrack Item Category	Metrc Item Category
Usable Cannabis	Bud/Flower - Each
	Raw Pre-Roll – Each
	Infused Pre-Roll – Each
Cannabis Extract for Inhalation	Concentrate/Extract - Each
	Vape Cartridge - Each
	Keif - Each
Liquid Cannabis RSO	Concentrate/Extract - Each
Liquid Cannabis Infused Edible	Infused Edible - Each
	Tincture – Each
Solid Cannabis Infused Edible	Infused Edible – Each
Cannabis Infused Topical	Topical – Each

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Thank you!

If you have additional questions, reach out to Metrc Support

📞 Phone: 877-566-6506

💬 Live chat or online via the
    Support Portal

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