



# Welcome to Metrc

New York Dispensaries Webinar – December 11, 2025

# Thank you for joining us today!

Meet the Metrc team



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Customer Success

# Agenda

- 1 **Metrc New York implementation**
- 2 **License specific guidance**
- 3 **API integrations and resources**
- 4 **Q&A**

# Implementation plan

Key milestones for Dispensaries

# Implementation timeline – Dispensaries

**Nov 7**  
**Metrc credentialing opens**  
*Take New Business*  
*Fundamentals in Metrc Learn*

2025

**Dec 17**

- Must be credentialed in Metrc & have business set up.
- Any product received will have a Package UID on each package.

**Feb 28**

Product cannot be transferred from Distributors to Dispensaries without a Retail Item ID affixed to each unit.

Product does not need a test passed status to transfer at this point.

2026

**Nov 7**  
**Package UID orders open**  
*Start account setup in Metrc\**

**Extension – Jan 12**

- All existing Beginning Inventory must be in the Metrc system.
- All packages must have a Package UID on each package.
- Must start reporting sales to Metrc.
- All external transfers (beginning inventory transfers) must be complete at this time.

**Mar 31**

- Any package(s) received by your facility must have a Package UID on each package.
- All inventory in Dispensaries must have a Retail Item ID affixed to each unit with associated testing results of either “TestPassed” or “RetestPassed”.

# Implementation steps – Dispensaries

## Step 1

### Get credentialed by 12/17

1. Register for Metrc Learn – [Link here](#)
2. Complete New Business Fundamentals – [Link here](#)
3. Once completed:
  - You will receive an email from [noreply@metrc.com](mailto:noreply@metrc.com) containing user credentials for the Metrc system.
  - **Log into Metrc within 72 hours of receiving your welcome email to validate credentials and begin working in Metrc.**

If you have questions, contact [credentialing@metrc.com](mailto:credentialing@metrc.com)

## Step 2

### Set up Metrc account

1. Order Package UIDs for # of SKUs you have on hand (*not individual units*)
2. Add Employees and employee permissions in Metrc
3. Generate your API keys (per employee) in Metrc for your third-party integrator systems (ex: POS)
4. For each SKU, create an Item in Metrc

Steps covered in New Business Fundamentals training

## Step 3

### Prepare – Beginning Inventory

- **Must complete in Metrc:** Physically receive Package UIDs, then digitally receive

Steps covered in:  
[Beginning Inventory Guide](#)

- Available to port over from POS systems: *Items, Strains & Locations*

Work directly with your POS vendor on this process

- External Incoming Transfers

Steps covered in:  
[Beginning Inventory Guide](#)

# Important reminders

## All Licensed Dispensaries *(even if you are not a fully operational)*

- Must be credentialed & your account set up in Metrc by 12/17.

## Physical on hand inventory

- Any physical inventory you currently have on hand without a Metrc Package UID can be sold until January 12, 2026.
- After January 12, all inventory must have a Metrc Package UID to be sold.

## After December 17<sup>th</sup>, if you are not fully live in Metrc:

- You will not be able to sell any products received to your facility through the Metrc system until all existing inventory is in the Metrc system via Package UIDs.
- If inventory is not yet in the Metrc system, all incoming transfers will:
  - Need to remain in the "Licensed Incoming Transfer" area until existing inventory is in the Metrc system via Package UIDs.
  - Once you have all existing inventory in the Metrc system, you can then receive that transfer and report it into your active inventory.

# License specific guidance

# Inventory tracking

Overview



# Metrc tracked inventory – Dispensaries

*Relevant UIDs for Dispensaries.*

| Type                   | Description  | Use case  | Cost                 | Who can order  |
|------------------------|--|---|----------------------|--|
| <b>Package UID</b>     | 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   |
| <b>Retail Item UID</b> | 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. | n/a for Dispensaries | Processors<br>Distributors (opens Feb. 1 for transition period only) |

## Important notes:

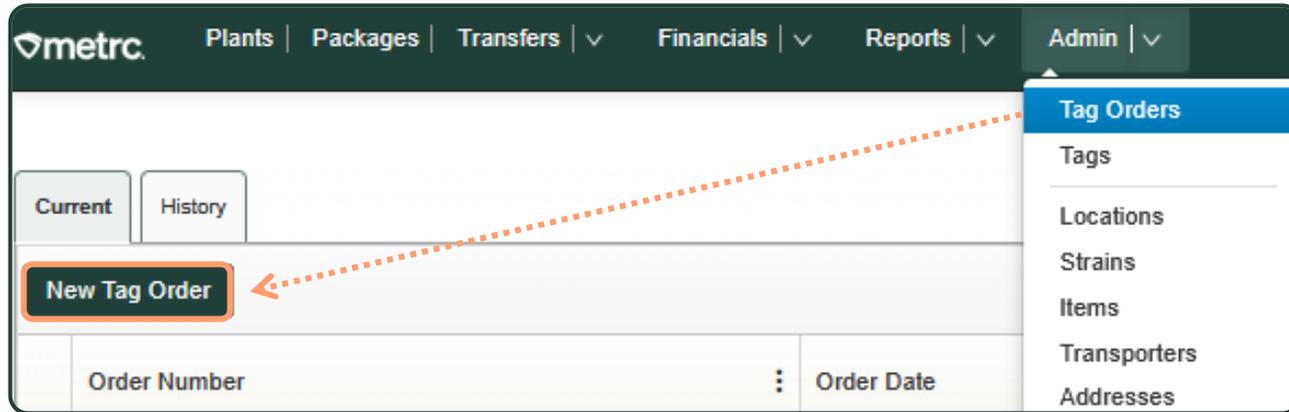
- Dispensaries are **not required** to purchase Retail Item IDs.
- Dispensaries can receive inventory from Distributors without Retail Item IDs on each unit until February 28, 2026.

# Ordering Package UIDs

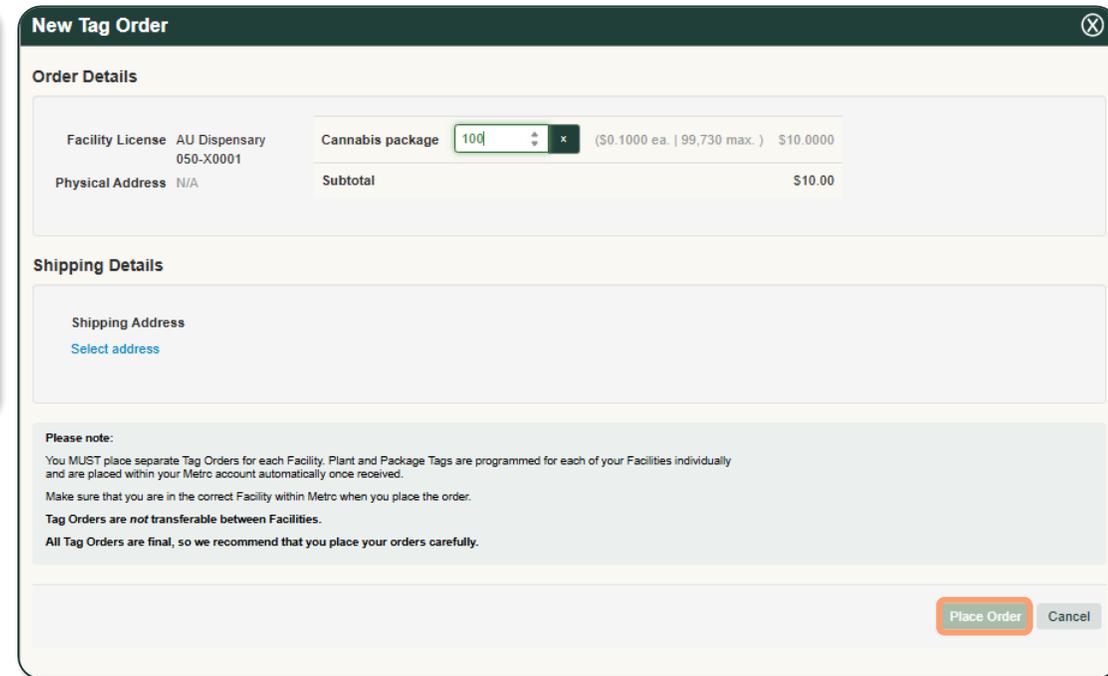
Overview

# Ordering Metrc Package UIDs

Begin ordering for existing on hand inventory



- 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 Package UIDs

*Be sure to physically receive UIDs before digitally “receiving” them in Metrc.*

The screenshot displays the Metrc web application interface. At the top, there is a navigation bar with the Metrc logo and several menu items: Plants, Packages, Transfers, Financials, Reports, and Admin. On the right side of the navigation bar, there are icons for Support, Saved, and a user profile. Below the navigation bar, there are two tabs: 'Current' and 'History'. A 'New Tag Order' button is highlighted with an orange border. Below this button is a table with the following columns: Order Number, Order Date, Status, Total, Paid, Tracking Number, and User. The table contains two rows of data:

| Order Number            | Order Date             | Status  | Total  | Paid | Tracking Number | User  |
|-------------------------|------------------------|---------|--------|------|-----------------|-------|
| > Demo-OR-2024-347-0694 | 12/12/2024<br>10:50 am | Shipped | \$0.00 |      |                 | OWNER |
| > Demo-OR-2024-347-0693 | 12/12/2024<br>10:50 am | Shipped | \$0.00 |      |                 | OWNER |

Overlaid on the right side of the table is a confirmation dialog box from testing-ny.metrc.com. The dialog box contains the text: "Are you sure you wish to receive Tag Order # Demo-All-2025-259-1201?". At the bottom of the dialog box, there are two buttons: 'OK' (highlighted with an orange border) and 'Cancel'. An orange dashed arrow points from the 'Receive' button in the table to the 'OK' button in the dialog box.

# Metric account setup

Overview

# Admins – Set up business account in Metrc



## Required to complete in Metrc:

- Package UID orders for initial Beginning Inventory.
- Adding Employees and employee permissions.

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

### Important note:

*If you are working with a POS vendor, ensure you work with them to port over any existing information – like Items, Strains, and Locations – to your Metrc account.*

**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.

Employee # 1 (clear)

Employee Role:

Employee Role Type:

First Name:

Last Name:

Birthday:

Enable online access to this Facility

Notification E-mail:

Phone Number:

Home:

Employment:

- Owner at this Facility
- Manager at this Facility
- Financial Contact at this Facility
- Bud Tender
- Compliance Manager
- Employee
- General Manager
- Inventory Control Manager
- Manager
- Owner
- Trimmer

Business Rules: Employees assigned to a role will have the associated permissions of that role applied to them. The role must exist in every facility selected. If a matching role is not found at any selected facility, you will receive an error message detailing which facility(s). If the role is updated at a later date, any permission changes will be assigned to the employee at the facility the role was updated in.

Permissions:

| Permissions         | Package Page                    | Other  |
|---------------------|---------------------------------|--|
| Getids (getid)      | <input type="checkbox"/> View   | <input type="checkbox"/> AU Cultivator   NY-C-X0001          |
| Inventory           | <input type="checkbox"/> Manage | <input type="checkbox"/> AU Dispensary   NY-D-X0001          |
| Create/Submit/Disco | <input type="checkbox"/> Manage | <input type="checkbox"/> AU Processor   NY-P-X0001           |
| Notes               | <input type="checkbox"/> Manage | <input type="checkbox"/> Distributor   NY-DC-X0001           |
|                     |                                 | <input type="checkbox"/> Distributor   NY-DC-X0002           |
|                     |                                 | <input type="checkbox"/> MED Cultivator   NY-C-X0002         |
|                     |                                 | <input type="checkbox"/> MED Dispensary   NY-D-X0002         |
|                     |                                 | <input type="checkbox"/> MED Processor   NY-P-X0002          |
|                     |                                 | <input checked="" type="checkbox"/> Testing Lab   NY-L-X0001 |
|                     |                                 | <input type="checkbox"/> Testing Lab   NY-L-X0002            |

Transfers Menu:

- Licensed & External:  View  Manage
- Templates:  View  Manage

Financials Menu:

- All:  Manage
- Invoices:  View

Reports Menu:

- All:  View

Admin Menu:

- Tag Orders:  Manage
- Tags:  Manage
- Locations:  Manage
- Strains:  Manage
- Items:  Manage
- Transporters:  Manage
- Employees:  View  Manage

Buttons:

+ 1

Please note:  
All new employees granted online access via the "Enable online access to this Facility" checkbox above will receive an e-mail with instructions and a hyperlink to log directly into their User Profile.  
If online access is granted:  
Once logged in, the User will need to update their security settings. The e-mail will contain the User's Username, link expiration date/time, and the Metrc web address.

# External Incoming Transfers

Overview

# External Incoming Transfers

Deadline extended through January 12, 2026



## 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.

# 1 Create External Incoming Transfers

## 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.

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

The screenshot shows the 'New Incoming Transfer' form with the following fields and values:

- Type:** Beginning Inventory (dropdown)
- Phone No.:** ex. +1-123-456-7890 (text input)
- Planned Route:** (empty text area)
- Invoice Number:** Enter the Invoice Number (text input)
- Est. Departure:** 10 / 10 / 2025 (calendar icon), 07 : 51 PM (time picker)
- Est. Arrival:** 10 / 10 / 2025 (calendar icon), 07 : 51 PM (time picker)
- Item For Package # 1:** Type part of the Item name... (text input), (clear) button
- Package Date:** mm / dd / yyyy (calendar icon), today button
- Quantity:** ex. 100.23 (spinner), - Select - (dropdown)
- Package Count:** + 1 (spinner), (package) label
- Buttons:** 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                              |
| Location                | Package Vault                    | Shipped Qty.     | 2500.42 g <input type="checkbox"/> Reject |
| Sublocation (Optional)  | Type part of the Sublocation nam | Receive Qty.     | 2500.42 Grams                             |

Cancel Complete Transfer

### Reminders:

- When bringing in beginning inventory for any packaged product, the product will come into Metrc as a Not Submitted testing status until sold out.
- After March 31, all products received from a Distributor should have a test passed status in Metrc to be received.

# Retail Item ID

# What is Retail Item ID?

Retail Item ID is a **digital unique identifier for each unit of Finished Good products** that, when scanned with a supported device, provides supplemental product information, such as **origin and test results**, ultimately increasing **consumer confidence and public awareness for regulated cannabis sales**.



# Unit tracking with Retail Item ID

*A digital ID for individual unit product labels to enhance supply chain visibility and drive operational efficiency.*

## ✓ Important information



Dispensaries can receive products without Retail Item IDs until February 28, 2026. After that time, all products must have Retail Item IDs already applied. **There will be no requirement for Dispensaries to purchase or adhere Retail Item IDs at any point in time.**

In New York, all cannabis products transferred from a processor to distributor facilities must be designated as a Finished Good package with a Retail Item ID applied to each unit **before transfer to distributors.**

This enables seamless product identification and intake at retail, extends product recalls to individual units, and improves consumer safety and visibility during product purchasing.

# Retail Item ID – Benefits

*One QR code, multiple benefits.*

- ✓ **Use at checkout\***: Scan the QR code to ring up products quickly and accurately
- ✓ **No relabeling needed**: Avoid extra stickers or duplicate barcodes—reduce waste and save time
- ✓ **Legitimacy & safety verification**  
QR codes provide verified compliance – consumers can confirm products are legal, lab-tested, and safe.
- ✓ **Supply chain transparency**  
Interactive QR codes offer access to test results and COAs, meeting regulatory requirements.

## Current POS integrations

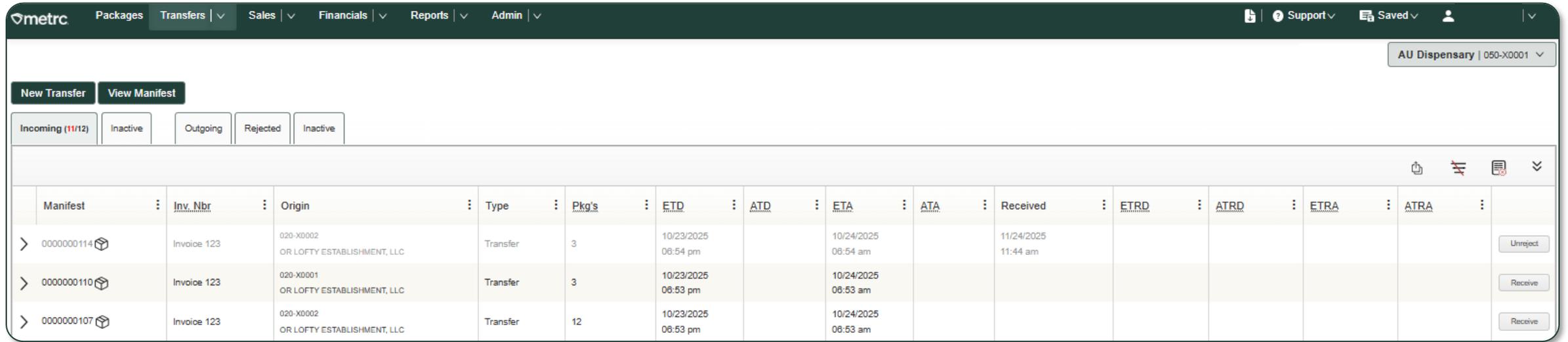


# Transfers – Intake

# Receiving Incoming Transfers

Located in the Transfers dropdown under the Incoming tab.

Once all inventory is in the Metrc system – **which is now required no later than January 12, 2026** – you will be able to receive incoming transfers through the Transfers grid.



The screenshot shows the Metrc interface for managing transfers. The top navigation bar includes 'metrc', 'Packages', 'Transfers', 'Sales', 'Financials', 'Reports', and 'Admin'. The 'Transfers' dropdown is active, showing 'Incoming (11/12)', 'Inactive', 'Outgoing', 'Rejected', and 'Inactive' tabs. The 'Incoming (11/12)' tab is selected. The main content area displays a table of incoming transfers with columns for Manifest, Inv. Nbr, Origin, Type, Pkg's, ETD, ATD, ETA, ATA, Received, ETRD, ATRD, ETRA, and ATRA. Three rows of data are visible, each with an 'Unreject' or 'Receive' button.

| Manifest     | Inv. Nbr    | Origin                                   | Type     | Pkg's | ETD                    | ATD | ETA                    | ATA | Received               | ETRD | ATRD | ETRA | ATRA |          |
|--------------|-------------|--|----------|-------|------------------------|-----|------------------------|-----|------------------------|------|------|------|------|----------|
| > 0000000114 | Invoice 123 | 020-X0002<br>OR LOFTY ESTABLISHMENT, LLC | Transfer | 3     | 10/23/2025<br>06:54 pm |     | 10/24/2025<br>06:54 am |     | 11/24/2025<br>11:44 am |      |      |      |      | Unreject |
| > 0000000110 | Invoice 123 | 020-X0001<br>OR LOFTY ESTABLISHMENT, LLC | Transfer | 3     | 10/23/2025<br>06:53 pm |     | 10/24/2025<br>06:53 am |     |                        |      |      |      |      | Receive  |
| > 0000000107 | Invoice 123 | 020-X0002<br>OR LOFTY ESTABLISHMENT, LLC | Transfer | 12    | 10/23/2025<br>06:53 pm |     | 10/24/2025<br>06:53 am |     |                        |      |      |      |      | Receive  |

**Important note** – If inventory is not yet in the Metrc system, all incoming transfers will:

- Need to remain as a "Licensed Incoming Transfer" until existing inventory is in the Metrc system via Package UIDs.
- Once all existing inventory is in Metrc, you can then receive that transfer and report it into your active inventory.

# Sales overview

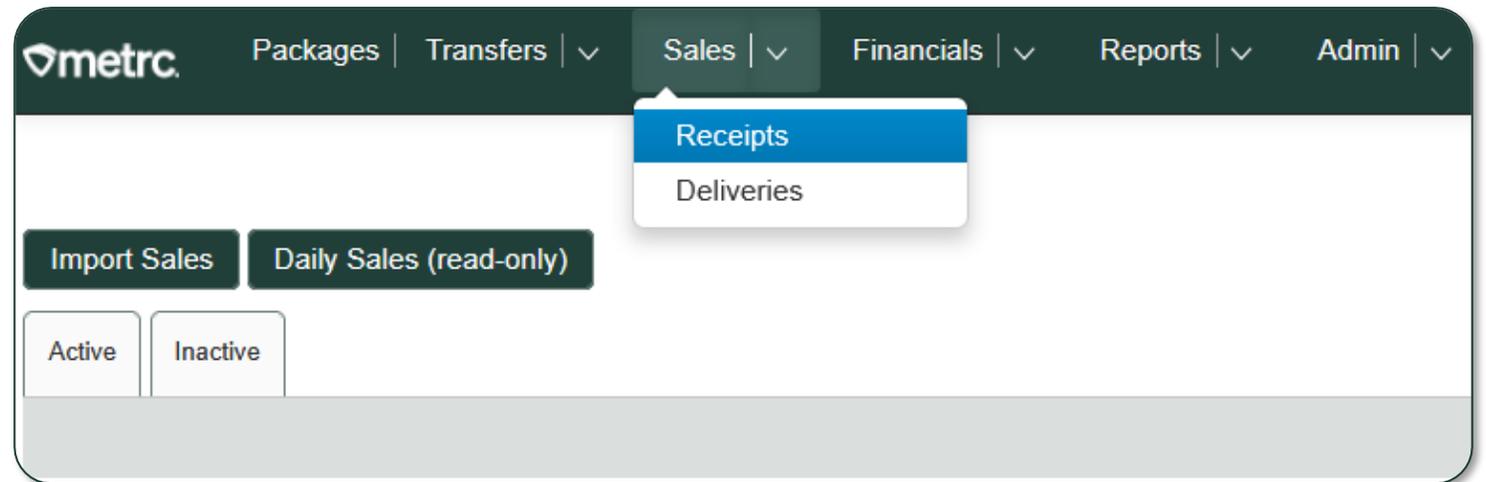
# Dispensary sales overview

Three ways to record sales in Metrc for reporting last event in chain of custody.

POS integration - API

CSV file upload

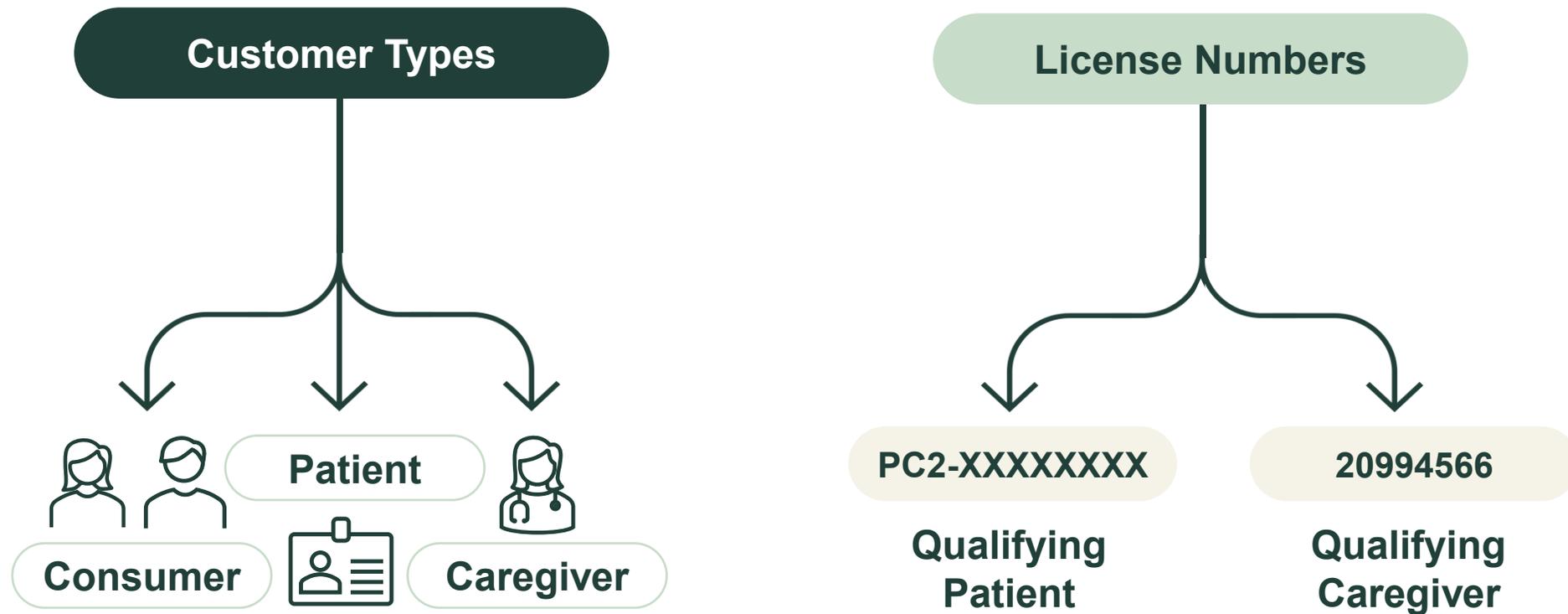
Manual entry



**Note:** Sales records must include Date, Package UID #, Total quantity sold, Unit of measure, and Total Price.

# Sales

Caregiver and Patient sales will require card numbers for both the Caregiver and Patient.



# Important Sales reminders

## Key updates

- ✓ There will be Sales Deliveries for Consumers and Patients dependent on license type.
- ✗ External Patient reciprocity will not be permitted.
- ✓ Patient Medical IDs will remain the same as with the current PMP system.

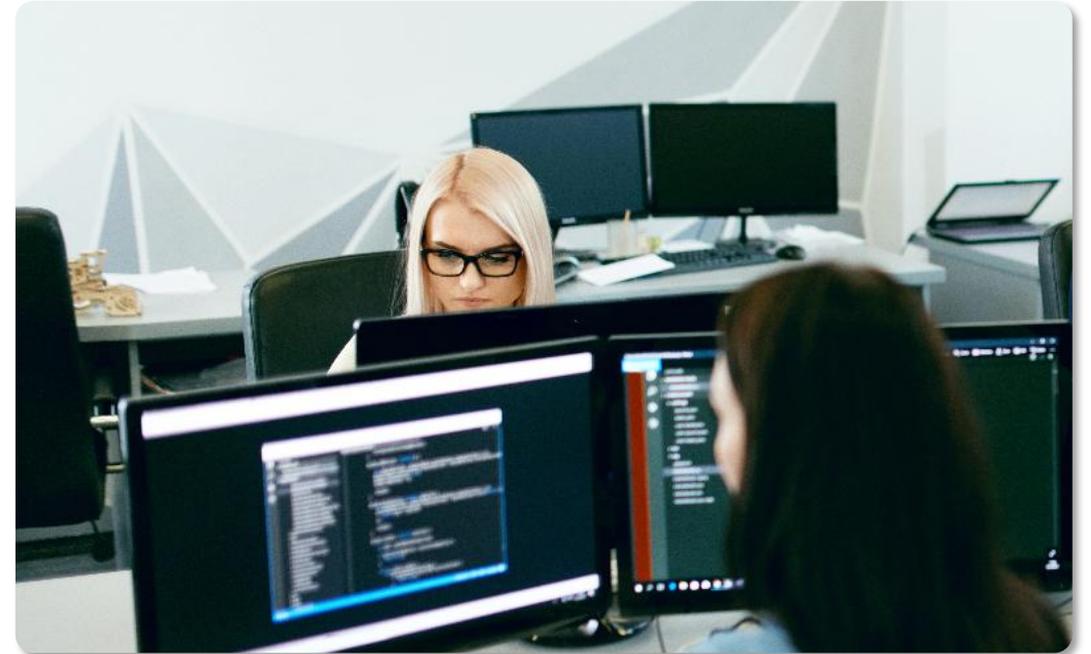
# API connections

# Third-party Integrators in New York

*Optional to use based on your business needs.*

[Metrc.com/validated-integrators/](https://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!**



# Metric resources

# Metric resources

*A glance at several resources to support your journey with Metric.*



## Support

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

- **Phone:** 877-566-6506
- **Online:** Support.metric.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.



## Training

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

- **Access:** Learn.metric.com or through mobile app: Go Learn
- **Available:** 24/7, 365 days
- **What to know:** Metric 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.



## Metric Expert

Access support documentation directly in the Metric system.

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



## Metric.com

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

- **Access:** Metric.com
- **Available:** 24/7, 365 days
- **What to know:** Metric.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](mailto:NoReply@metrc.com)
- [Communications@metrc.com](mailto:Communications@metrc.com)



## Check out Metrc Expert

- Guided walkthrough
- New Account Checklist

## Additional training resources

Admin Training

Beginning Inventory Guide

Creating Beginning Inventory Training

Metrc Learn Training: Retailers

# 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:<br>12/05/2025   | Effective Date:<br>Ongoing |
| <b>Contact Point:</b> Metrc Support   | <b>Subject:</b> Item Product Chart |                            |
| <b>Reason:</b> 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             |

# Key reminders

# Important for Dispensaries

- ✘ You are **not required** to purchase Retail Item UIDs.
- ✘ If you are not fully operational, you still **need to be credentialed & your account set up in Metrc by 12/17.**
- ✓ Any physical inventory you currently have on hand without a Metrc Package UID can be sold until January 12, 2026.  
  
After January 12, all inventory must have a Metrc Package UID to be sold.
- ✓ You can receive inventory from Distributors without Retail Item IDs on each **unit until February 28, 2026.**

# Important for Dispensaries

If you are not credentialed and have your Metrc account set up.

- ✘ You will not be able to sell any products received to your facility through the Metrc system until all existing inventory is in the Metrc system via Package UIDs.
- ✘ If inventory is not yet in the Metrc system, all incoming transfers will:
  - Need to remain in the "Licensed Incoming Transfer" area until existing inventory is in the Metrc system via Package UIDs.
  - Once you have all existing inventory in the Metrc system, you can then receive that transfer and report it into your active inventory.

# Thank you!

If you have additional questions, reach out to Metrc Support



**Phone: 877-566-6506**



**Live chat or online via the  
Support Portal**