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

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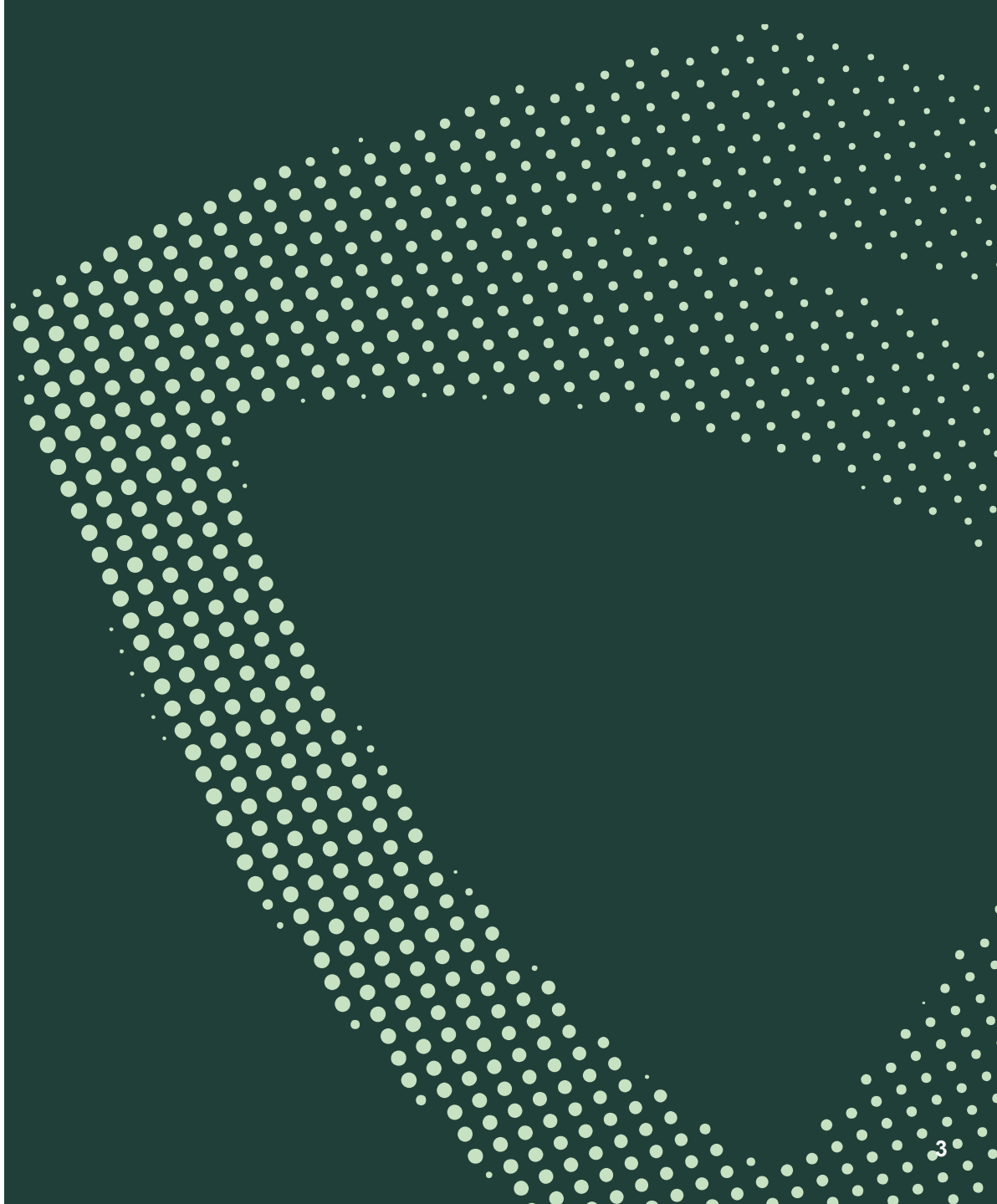
Agenda

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



Implementation plan

Key milestones for Dispensaries

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Implementation timeline – Dispensaries

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

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.

2025 | **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”.

**If you are working with a POS vendor, ensure you work with them to port over any existing information to your Metrc account.*

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* 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

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 17th, 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

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Inventory tracking

Overview

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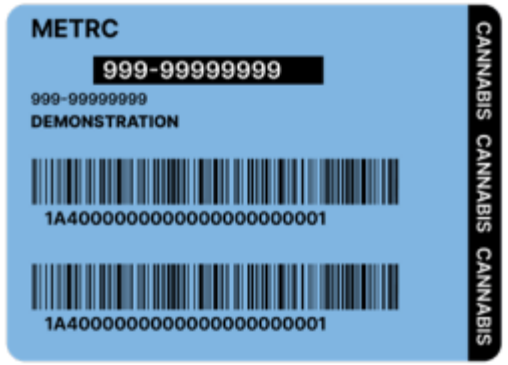
Metrc tracked inventory for Dispensaries

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



Packages

(batch / lots)

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 – Dispensaries

Relevant UIDs for Dispensaries.

Type	Description	Use case	Cost	Who can order
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.	n/a for Dispensaries	Processors 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

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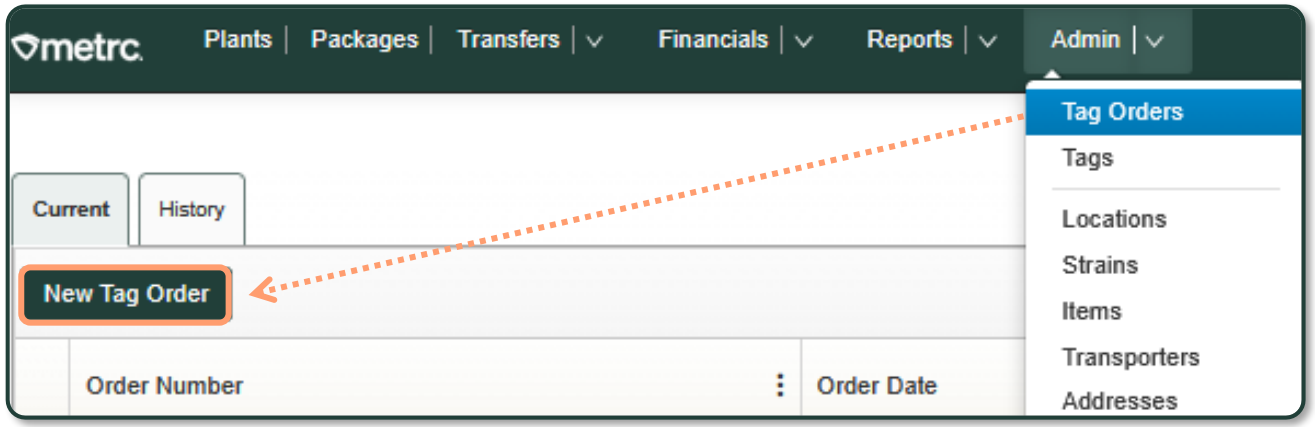
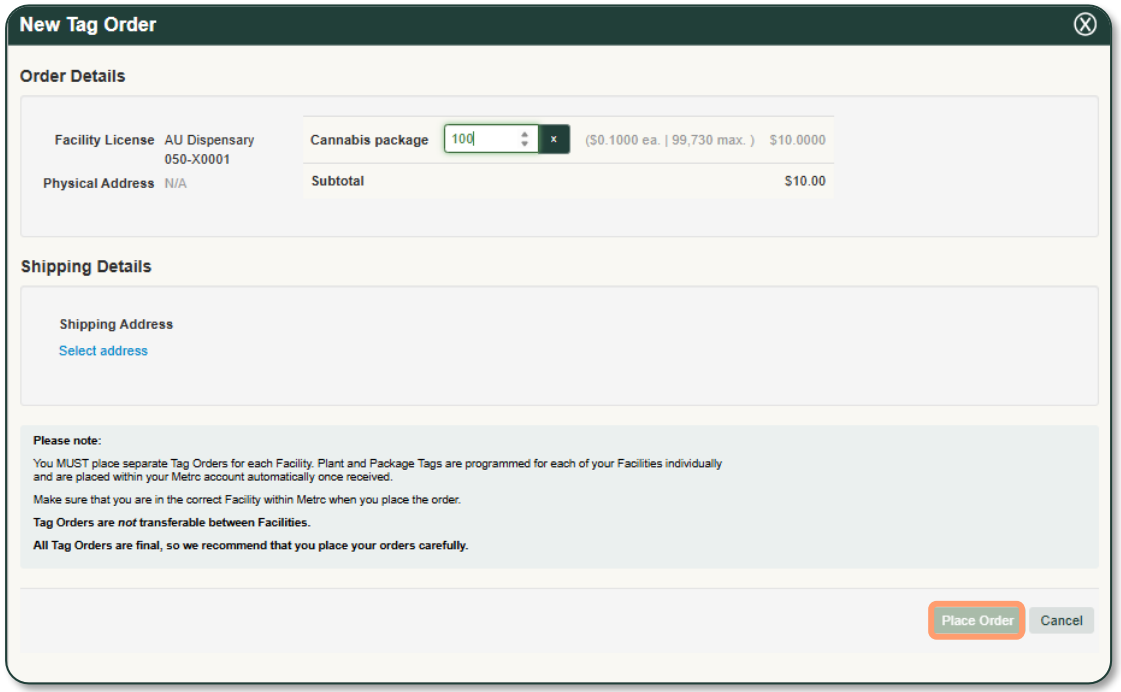
Ordering Metrc Package UIDs

Begin ordering for existing on hand inventory

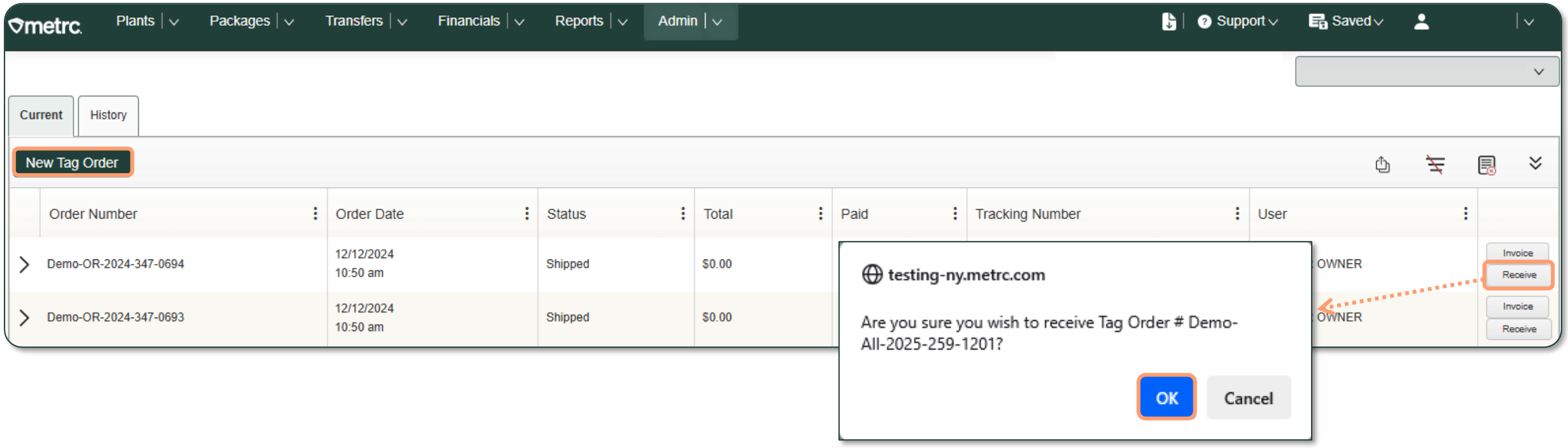




- All ordering occurs in Metrc.
- Place separate orders for each facility as they are programmed for each facility's account individually.
- Make sure that you are in the correct facility within Metrc when you place the order.
- Orders are *not* transferable between facilities.
- All orders are final.

Receiving Metrc Package UIDs

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



Metrc account setup

Overview

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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.

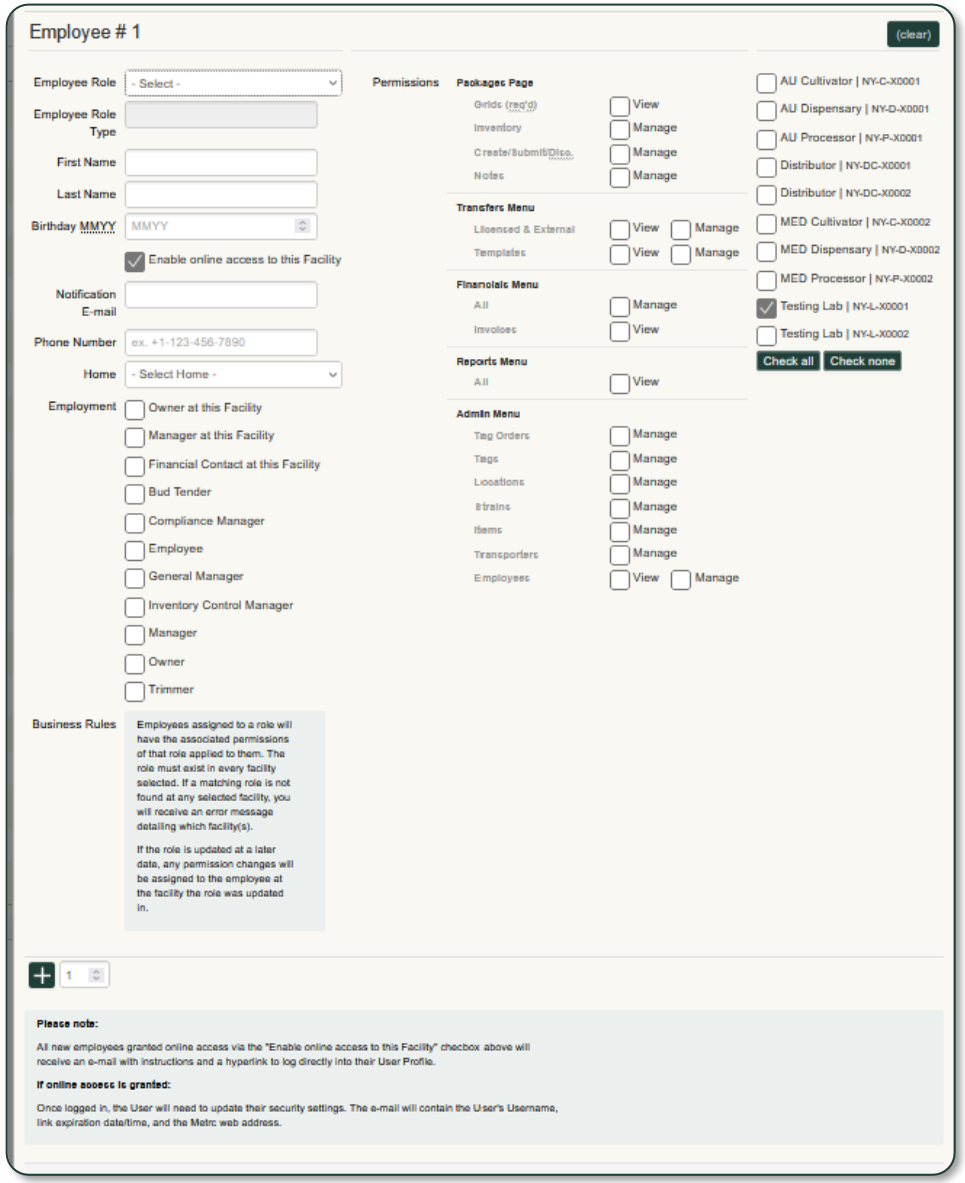
Your API key must be generated in Metrc to use the API to complete these actions.

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.



External Incoming Transfers

Overview

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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

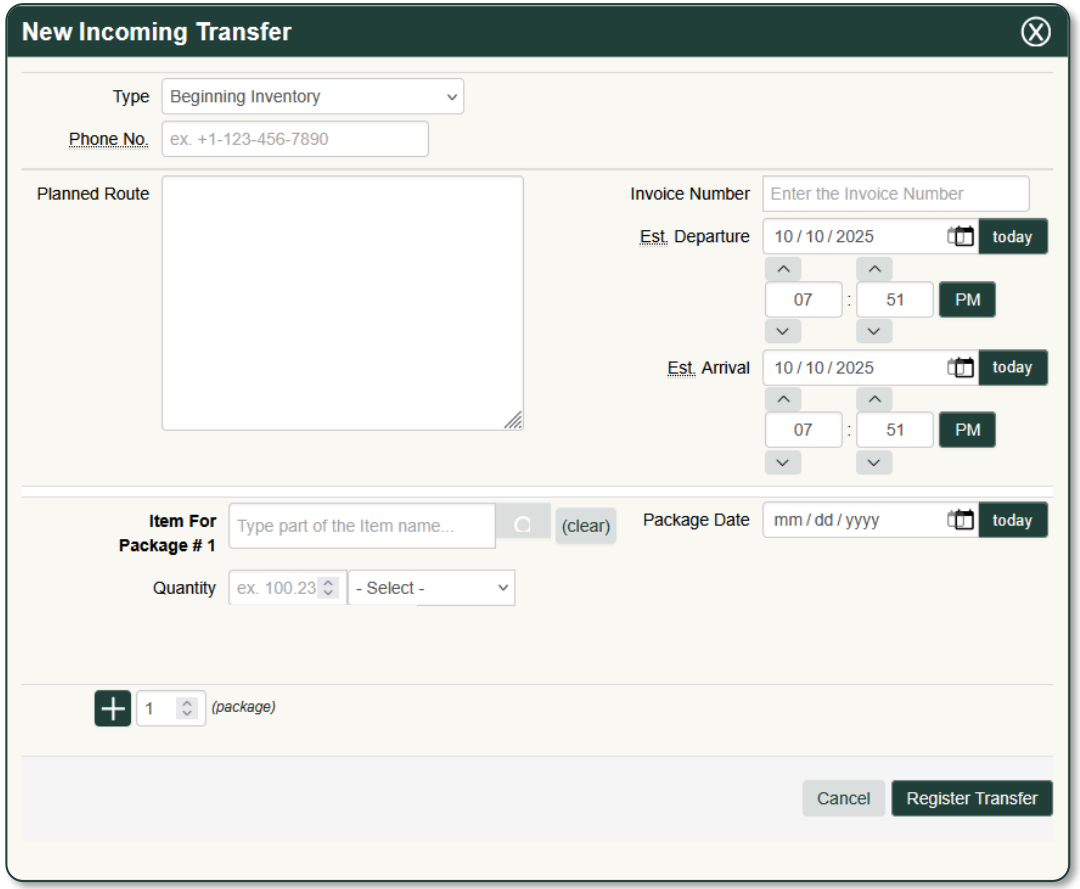
Option 1: Third-party systems

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.

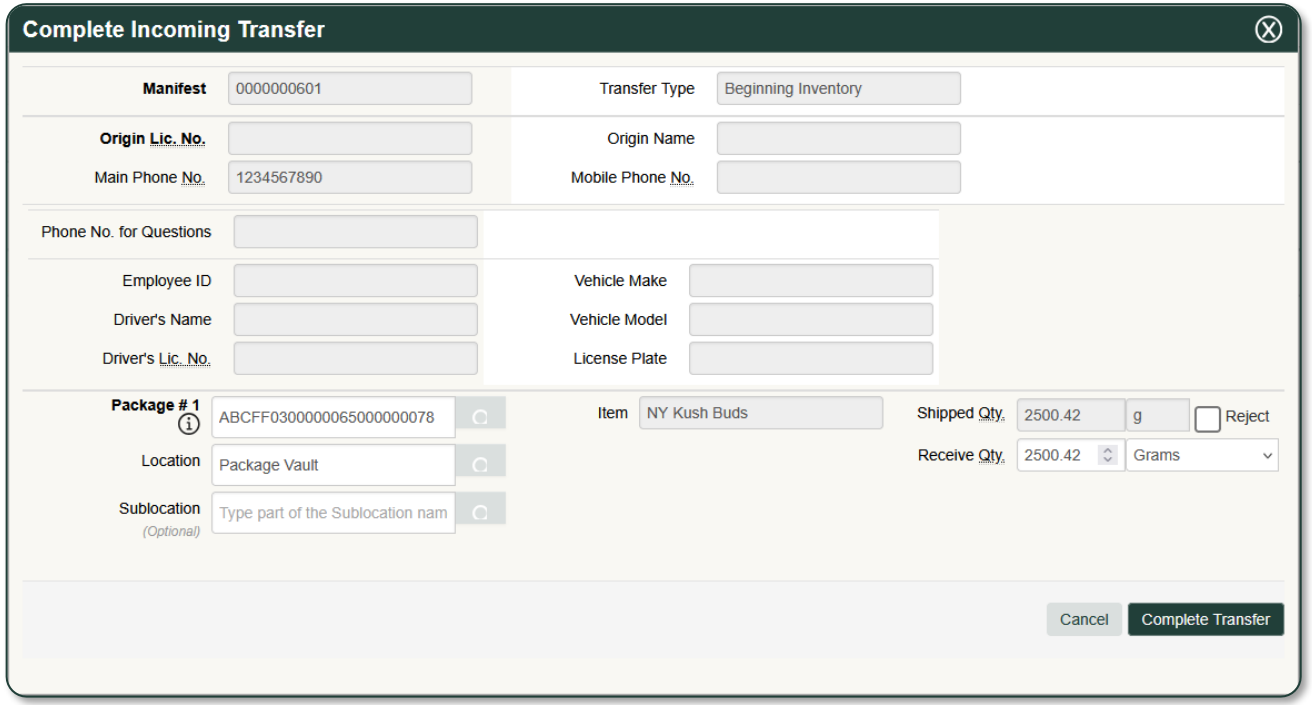
- Planned Route field should state “Received and weighed at the Licensed Business Number #__. Verified by the Metrc Admin."



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.



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

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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

BLAZE™ dutchie

flowhub growflow

IndicaOnline Jane

TREEZ

Transfers – Intake

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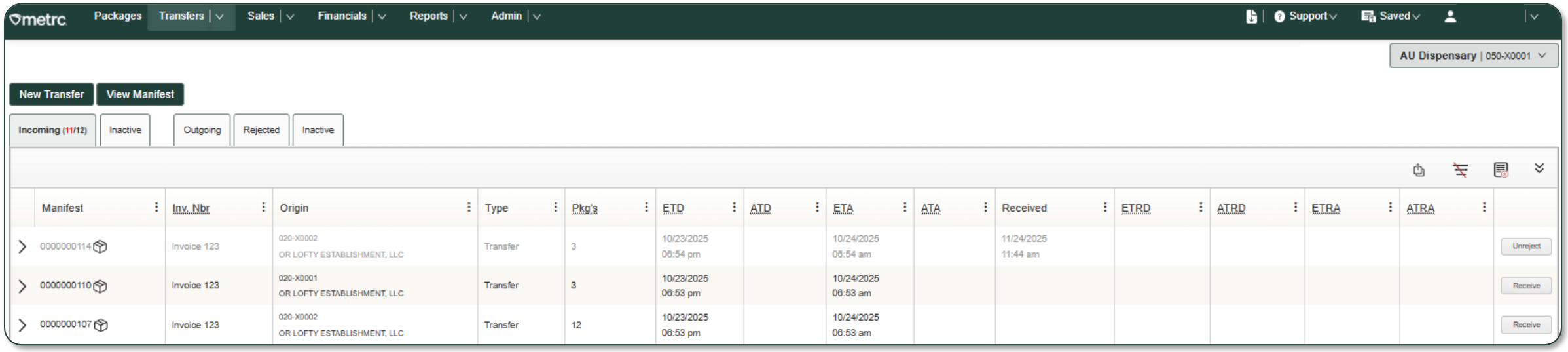
Receiving Incoming Transfers

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.



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

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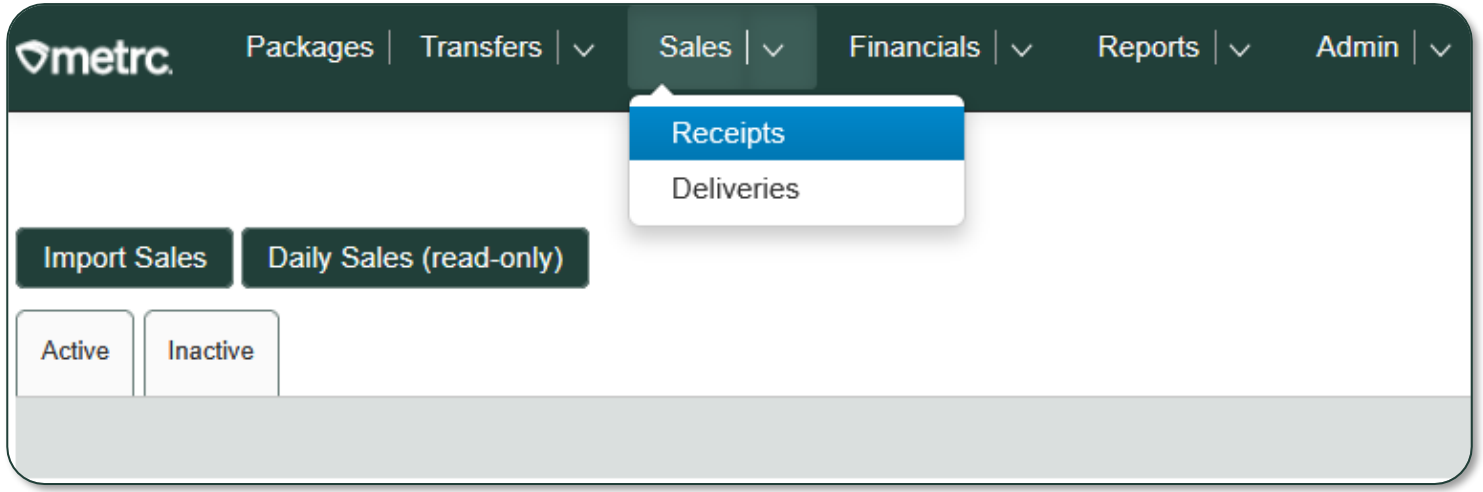
Dispensary sales overview

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

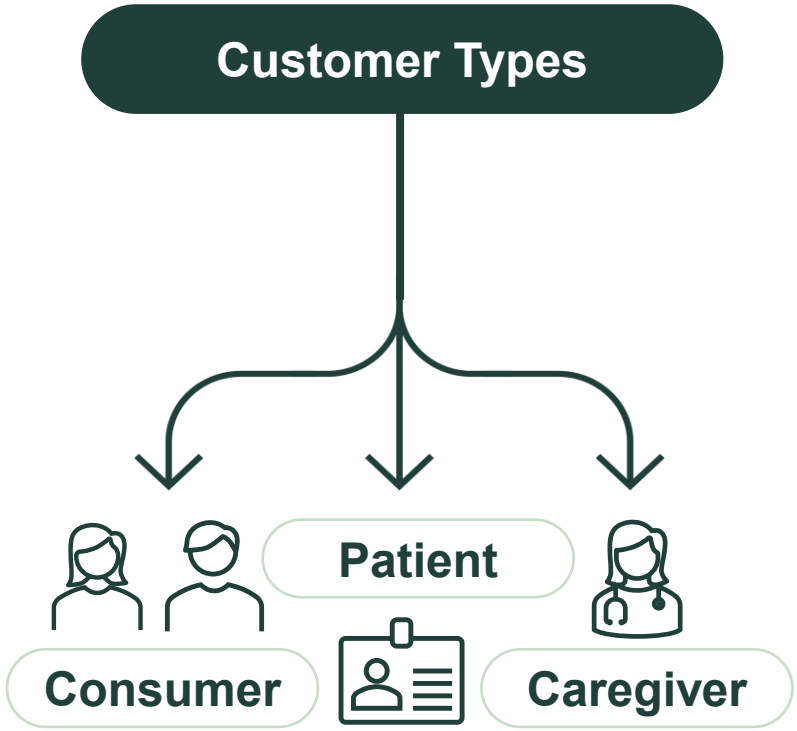
- **POS integration - API**
- **CSV file upload**
- **Manual entry**

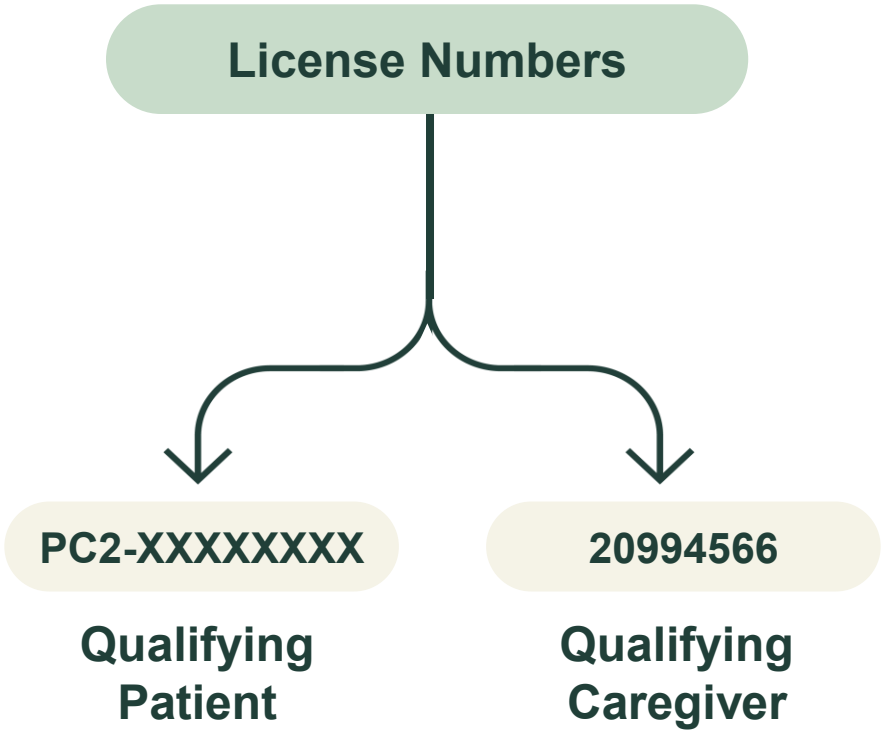


Note: Sales records must include Date, Package UID #, Total quantity sold, Unit of measure, and Total Price.

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

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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!**

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 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: 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

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

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