



Welcome to Metrc

New York Distributors Webinar – December 9, 2025

Thank you for joining us today!

Meet the Metrc team



Brent Doherty
Regional Director,
Customer Success



Jessica Painter
Manager,
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 your licensed facility type

Distributor timeline & milestones (Part 1)

Available now

Timing	Actions
November 7	<ul style="list-style-type: none"> • Register for Metrc Learn and complete New Business Fundamentals training. • Get credentialed in the Metrc system. • Set up your business and Admin dropdown (Employee permissions, etc.). • Start ordering Package UIDs for existing inventory.
December 5	<ul style="list-style-type: none"> • If you are working with a third-party integrator, ensure you work with them to port over any existing information to your Metrc account.

Upcoming deadlines **Beginning Inventory period**

Timing	Actions
December 17 <u>Final due date</u>	<ul style="list-style-type: none"> • All existing inventory must be in the Metrc system. <ul style="list-style-type: none"> • All packages must have a Package UID on each package. • Must add all employees in Metrc • All external transfers (beginning inventory transfers) must be complete at this time. • Any product leaving a Distribution facility at this time must have a Package UID on each package prior to transfer.

Distributor timeline & milestones (Part 2)

Post-beginning Inventory period

February 1

- Ability to purchase Retail Item IDs
- Begin inventory assessment(s) – product(s) without Retail Item IDs

February 15

Complete inventory assessment(s) – product(s) without Retail Item IDs

Option 1: Transfer product back to processors to have the Retail Item ID QR code added to the finished good product package.

Option 2: Distributors can purchase Retail Item IDs for each unit and adhere them to the finished good product package.

February 28

Any finished good products leaving a distribution facility to transfer to a dispensary MUST have Retail Item ID QR code on each unit

March 31

Any products transferring to a dispensary, MUST have:

- A Retail Item ID QR code on each unit
- A "TestPassed" or "RetestPassed" testing status associated to each package prior to transfer.

License specific guidance

Beginning inventory

Beginning inventory guidance

Ends on December 17th



Start ordering Package UIDs



Admins – Set up business account in Metrc with required info

- Package UID orders and adding Employees must be completed in Metrc.
- 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.*

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

Beginning inventory guidance

Ends on December 17th



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:

- **Step 1:** Creating an External Incoming Transfer can be completed through the Metrc API via third-party systems to push the initial inventory into the system in batches (or manually in the Metrc system.)
- **Step 2:** Receiving the External Incoming Transfer must be done manually in the Metrc system.

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

Inventory tracking

Metric Package UID and Retail Item ID

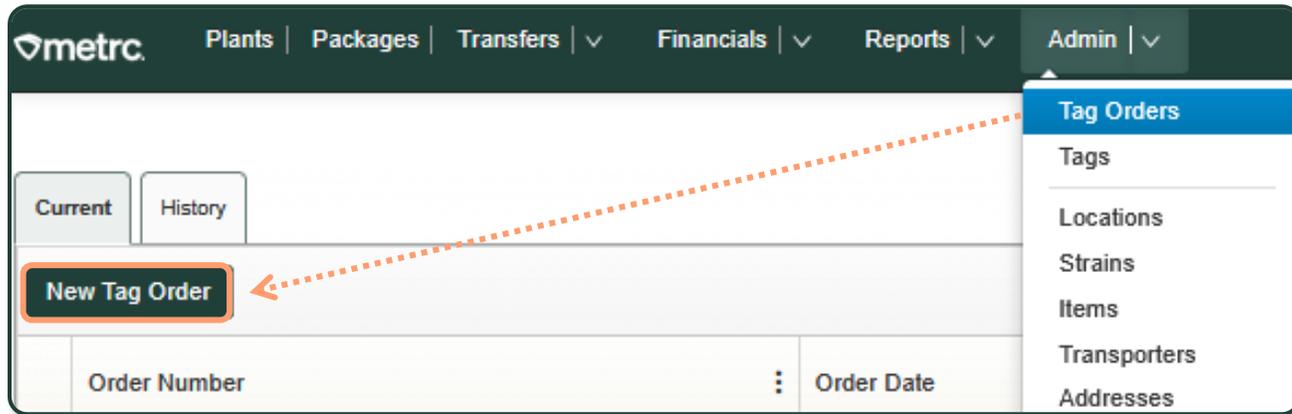
Metric tracked inventory

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

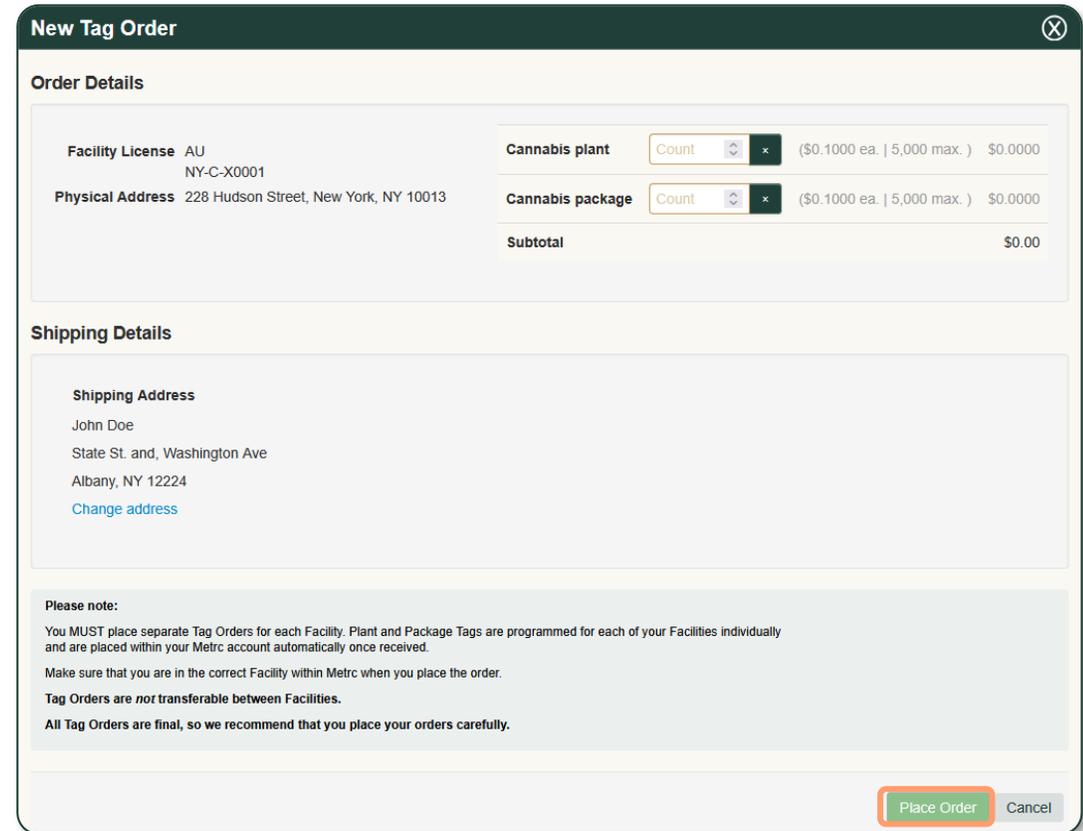
Type	Description	Use cases	Cost	Who can order
Plant UID	<p>A physical UID used to affix to an individual plant with a plant strap. Each UID has a Radio Frequency Identification (RFID) inlay that passively emits a unique signal to identify each plant in your cultivation facility.</p> <p>Use of third-party RFID solutions is optional.</p>	<p>When a plant reaches the vegetative stage, the plant UID is attached. This same UID stays on the plant until it's harvested.</p>	\$0.10 per UID	Cultivators
Package UID	<p>A physical UID used to identify all usable cannabis related inventory. Each UID includes an RFID inlay to track all material that is not part of an actively growing plant. This UID is adhered like a sticker to the physical package.</p>	<p>Package UIDs are assigned to any usable cannabis material including bulk, work-in-progress, lab samples, trade samples, and finished goods.</p>	\$0.10 per UID	All license types
Retail Item ID	<p>Digital only. A unique serialized QR code assigned to each individual finished good unit to track through retail sale.</p>	<p>All cannabis products transferred to retail-facing facilities must be designated as a Finished Good package with a Retail Item ID printed and applied to each unit in the batch package before transfer to distributors.</p>	\$0.10 per ID	Processors Distributors (opens Feb. 1 for transition period only)

Ordering Metrc 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.

A screenshot of the 'New Tag Order' form in the Metrc application. The form is titled 'New Tag Order' and has a close button in the top right corner. It is divided into two main sections: 'Order Details' and 'Shipping Details'.
Order Details:
- Facility License: AU NY-C-X0001
- Physical Address: 228 Hudson Street, New York, NY 10013
- Cannabis plant: Count (dropdown) x (\$0.1000 ea. | 5,000 max.) \$0.0000
- Cannabis package: Count (dropdown) x (\$0.1000 ea. | 5,000 max.) \$0.0000
- Subtotal: \$0.00
Shipping Details:
- Shipping Address: John Doe, State St. and, Washington Ave, Albany, NY 12224. There is a 'Change address' link below the address.
Please note:
- You MUST place separate Tag Orders for each Facility. Plant and Package Tags are programmed for each of your Facilities individually and are placed within your Metrc account automatically once received.
- Make sure that you are in the correct Facility within Metrc when you place the order.
- Tag Orders are *not* transferable between Facilities.
- All Tag Orders are final, so we recommend that you place your orders carefully.
At the bottom right, there are 'Place Order' and 'Cancel' buttons. The 'Place Order' button is highlighted with a red box.

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 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 tabs for 'Current' and 'History'. A 'New Tag Order' button is highlighted with a red box and a dashed arrow pointing to the 'New Tag Order' modal window.

The 'New Tag Order' modal window contains the following information:

- Order Details:**
 - Facility License: Cultivation - Tier 1 - 01 020-X0001
 - Physical Address: N/A
 - Cannabis plant: 500 (\$0.4500 ea. | 5,000 max.) \$225.0000
 - Cannabis package: 500 (\$0.2500 ea. | 5,000 max.) \$125.0000
 - Include Straps With Plant Tags
 - Subtotal: \$350.00
- Shipping Details:**
 - Shipping Address: John Jacobs, 8201 SUBBASE, ST THOMAS, VI 00802-5863
 - Change address
 - Once you have placed your tag order, please submit a Metro Support ticket through the Metro Help Portal, which can be found under the Support tab in Metro. After your ticket has been submitted, we will be able to confirm the order and process the payment for shipping. Thank you for your cooperation!
- Please note:**
 - You MUST place separate Tag Orders for each Facility. Plant and Package Tags are programmed for each of your Facilities individually and are placed within your Metro account automatically once received.
 - Make sure that you are in the correct Facility within Metro when you place the order.
 - Tag Orders are not transferable between Facilities.
 - All Tag Orders are final, so we recommend that you place your orders carefully.

At the bottom of the modal, there are 'Place Order' and 'Cancel' buttons.

In the background, a table is visible with columns: Paid, Tracking Number, User, Invoice, and Receive. The 'Receive' button for the first row is highlighted with a red box and a dashed arrow pointing to a confirmation dialog box.

The confirmation dialog box is titled 'testing-ny.metrc.com' and contains the text: 'Are you sure you wish to receive Tag Order # Demo-All-2025-259-1201?'. It has 'OK' and 'Cancel' buttons.

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



In New York, once the beginning inventory period closes (December 17th) all cannabis products transferred 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 IDs are ordered in Metrc and individually deducted when used in a finished good package.

Retail Item ID – Benefits for Distributors

Unprecedented access to real-time market performance data and expanded storytelling capabilities.

Legitimacy & safety verification

QR codes provide verified compliance data, allowing consumers to confirm products are legal, lab-tested, and safe.

Brand protection

Additional counterfeit protection via clear presentation of authenticity and safety details helps consumers avoid illicit products and builds trust.

Supply chain transparency

Interactive QR codes offer access to test results and COAs, meeting regulatory requirements.

Labor efficiency

No relabeling required for Distributors; All individual units will have Retail Item IDs already affixed.

Coming soon! Sales insights, proof of purchase, and additional public health and safety benefits

Retail Item ID workflow – Distributors

Processors generate codes

Codes Repackaged: 1000

Codes Received: 1000

Codes Remaining: 500 sold, 500 to sell

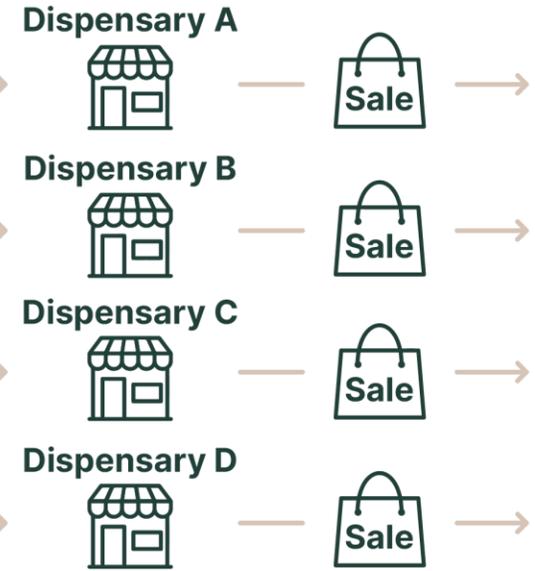
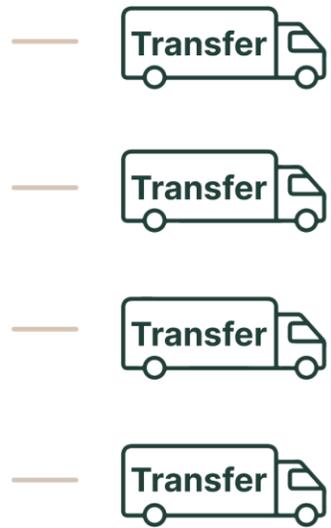
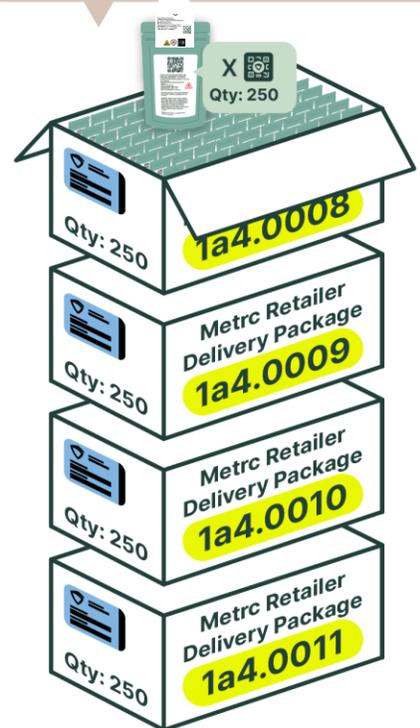
1 Distributors will receive packages with Retail Item IDs already applied to individual units.

2 In Metrc, repackage using current process for planned deliveries. Package tags can be used as the "Case Pack".

3 Transfer package(s) to select dispensaries

4 Dispensaries receive package(s) in Metrc. Note: POS integrates with Metrc to sync Retail Item IDs with packages, pending vendor's integration capabilities.

5 Dispensaries conduct sales by scanning Retail Item IDs



- Package 1a4.0008**
Qty sold: 50
- Package 1a4.0009**
Qty sold: 100
- Package 1a4.0010**
Qty sold: 250
- Package 1a4.0011**
Qty sold: 100

Metrc tracked inventory credits

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 do not expire 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.

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 no longer be available for use after December 17, 2025.**
- Transfer Templates available for all license types.

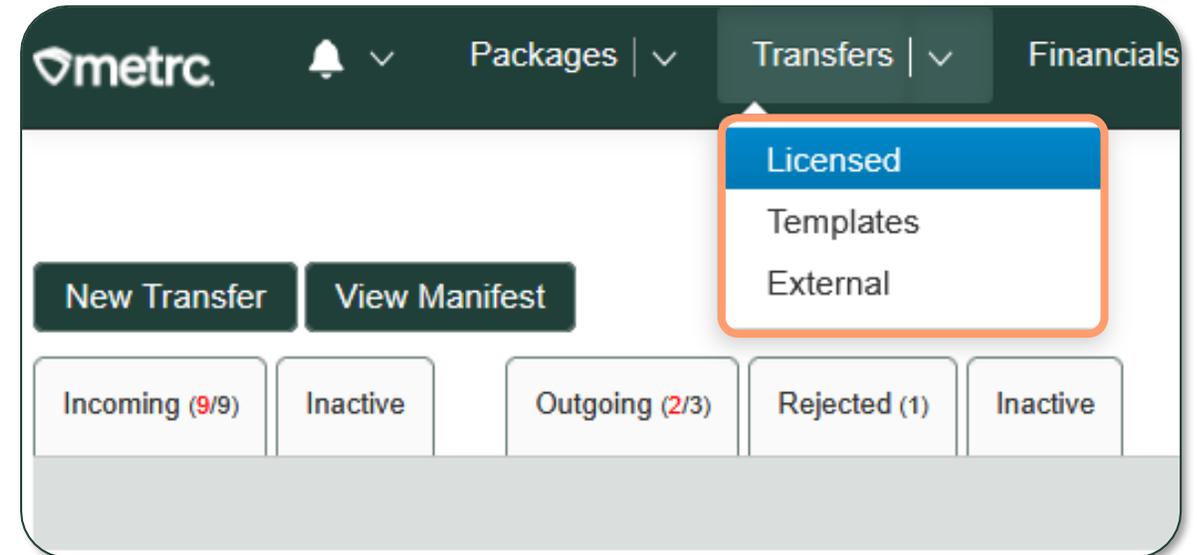
Standard Transfer Types

- ***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.

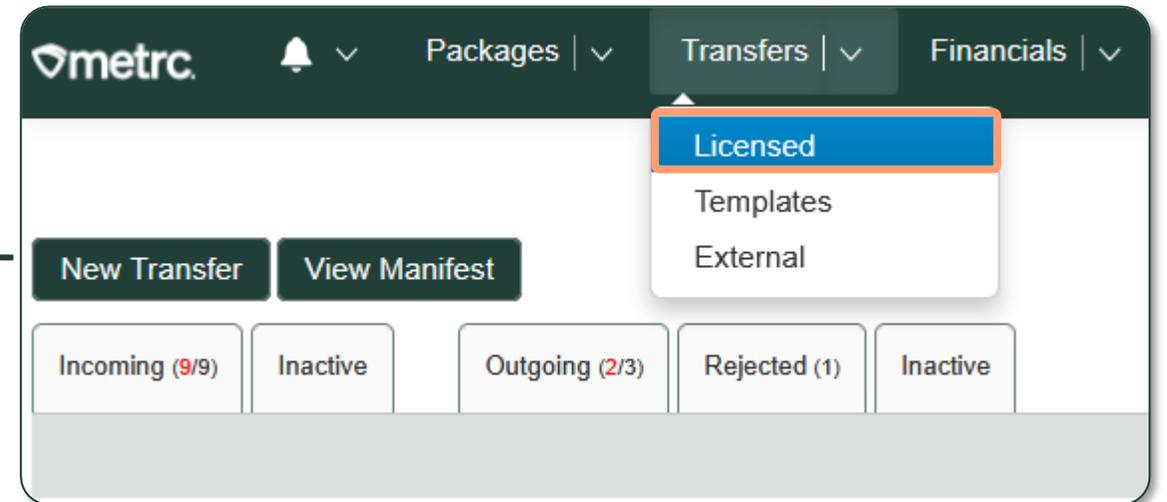


Licensed Transfers overview

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:
 - Incoming
 - Inactive incoming or outgoing
 - Outgoing
 - Rejected



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.

Transfer Manifests

View Transfers area in Metrc.

The screenshot shows the Metrc interface for viewing transfer manifests. The top navigation bar includes 'Packages', 'Transfers', 'Financials', 'Reports', and 'Admin'. The 'Transfers' menu is highlighted. Below the navigation, there are buttons for 'New Transfer' and 'View Manifest'. A dropdown menu for 'Destination' is open, showing options for 'Sort Ascending', 'Sort Descending', 'Columns', and 'Filter'. The 'Filter' option is highlighted, and a filter dialog is open with 'Contains' selected. The main table displays three manifest entries with columns for Manifest, Destination, Stops, Pkg's, Employee, and Date Created. The bottom of the page shows pagination information: 'Page 1 of 1' and '20' items per page.

Manifest	Destination	Stops	Pkg's	Employee	Date Created	
> 0000000069	ABLISHMENT, LLC)	1	3	RETAILER OWNER	10/22/2025 08:44 pm	Edit Void
> 0000000062	ABLISHMENT, LLC)	1	12	RETAILER OWNER	10/22/2025 08:43 pm	Edit Void
> 0000000057	402-X0001 (CO LOFTY EST)	1	5	RETAILER OWNER	10/22/2025 08:43 pm	Edit Void

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.

- Highlight a manifest and click the View Manifest button to display a PDF version.
- A transfer can be rejected entirely or one or more packages from it can be rejected.
 - Individual items cannot be rejected from a package on a manifest.

METRC® MARIJUANA TRANSPORTATION MANIFEST

All sales transactions are to be completed prior to transportation of any MARIJUANA. The receiving entity may reject product delivered, but amount delivered must be limited to amount agreed upon in prior sales transaction.

Manifest No.	000001602	Date Created	10/08/2025 5:35 PM
Originating Entity	AU Cultivator	For Agency Use Only	
Originating License Number	NY-C-X0001		
Address of Originating Entity	228 Hudson Street, New York, NY 10013		
Phone No. of Originating Entity			
1. Destination	Testing Lab	Destination Phone No.	
Invoice Number			
Destination License Number	NY-L-X0001	Date and Approx. Time of Departure	10/08/2025 8:32 PM
Address of Destination	30 Greene Street, New York, NY 10012		
		Date and Approx. Time of Arrival	10/08/2025 8:32 PM
		Date/Time Received	
Route to be Traveled	Beginning Inventory Test Sample Batch 1298A		
	Notes: details for extenuating circumstances (e.g., road closure, flat tire, etc.)		
1. Outbound Transporter	Testing Lab	No Layover Scheduled	
Transporter License Number	NY-L-X0001		
Address of Transporter	30 Greene Street, New York, NY 10012		
Contact Phone No. for Inquiries: 1234567890			
Name of Person Transporting	Electronic Sample	Employee ID of Driver	Electronic Sample
State Driver's License No.	Electronic Sample	Signature of Person Transporting	
Make, Model, License Plate No.	Electronic Sample Electronic Sample	Leg of Layover Trip	
	Electronic Sample		
1. Package Shipped	Production Batch No.	Item Name	Quantity
ABCF030000006500000071		Blue Dream Flower Bulk (Bud/Flower - Bulk)	Shp: 5 g
Lab Test: SubmittedForTesting			
Contains Retail IDs: No			
Item Details			
Strain: Blue Dream			
Source Package(s)	ABCF0300000085000000067	Quantity When Sampled	10 g
Source Production Batch	00067		
Req'd Lab Test Batches	Medical Raw Plant Material - Bulk		
PRODUCT REJECTION (if only a portion of shipment is rejected, circle that portion above)			
Name of Person Receiving or Rejecting Product			
I confirm that the contents of this shipment match weight records entered above, and I agree to take custody of those portions of this shipment not circled above. Those portions circled were returned to the individual delivering this shipment.			
Signature		Date	
Signature of individual taking receipt of rejected portion of this shipment			

Transfer Manifests

View and edit through Transfers area in Metrc.

Click the expand arrow to display:

Transporter Information

Package Information

New Transfer View Manifest

Incoming Inactive Outgoing (3/3) Rejected Inactive

Manifest	Destination	Stops	Pkg's	Employee	Date Created	
<input checked="" type="checkbox"/> 000000069	402-X0001 (CO LOFTY ESTABLISHMENT, LLC)	1	3	RETAILER OWNER	10/22/2025 08:44 pm	<input type="button" value="Edit"/> <input type="button" value="Void"/>
Destinations Transporter Details Notes History						
Please select a tab to view its content.						
> 000000062	402-X0001 (CO LOFTY ESTABLISHMENT, LLC)	1	12	RETAILER OWNER	10/22/2025 08:43 pm	<input type="button" value="Edit"/> <input type="button" value="Void"/>
> 000000057	402-X0001 (CO LOFTY ESTABLISHMENT, LLC)	1	5	RETAILER OWNER	10/22/2025 08:43 pm	<input type="button" value="Edit"/> <input type="button" value="Void"/>

Note:

Detailed information and best practices are provided in Metrc New Business Fundamentals.

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!**



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

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
- Communications@metrc.com

Additional training resources

Admin Training

Beginning Inventory Guide

Creating Beginning Inventory Training

Metrc Learn Training: Distribution



Retail Item ID Hardware and Software

- [Resource center](#)



Check out Metrc Expert

- Guided walkthrough
- New Account Checklist

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

Thank you!

If you have additional questions, reach out to Metrc Support



Phone: 877-566-6506



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