



# Welcome to Metrc

Learn how to access Metrc and training resources

# Welcome

Hello,

We are excited to introduce you to Metrc, a leading provider of track-and-trace, frequently called seed-to-sale, technology for the cannabis industry. Our system is designed to help businesses like yours ensure compliance with state regulations, streamline operations, and maintain transparency throughout the supply chain. As a trusted partner to 30 regulated markets, Metrc is committed to supporting the growth and success of the cannabis industry by providing reliable, secure, and user-friendly solutions.

From cultivation and harvesting to distribution and retail, our system captures critical data points to support transparency, product integrity, and regulatory compliance. At Metrc, we understand that navigating the complexities of the cannabis industry can be challenging. That's why we offer dedicated support and training to help you make the most of our system. Our team of experts are available to assist with any questions or concerns you may have, ensuring a smooth and efficient implementation process. The following pages in this packet will help you get started with Metrc as it becomes your tool for compliance.

We are proud to support your business in compliance and look forward to working together to build a transparent, accountable, and thriving cannabis industry.

Sincerely,  
The Metrc team

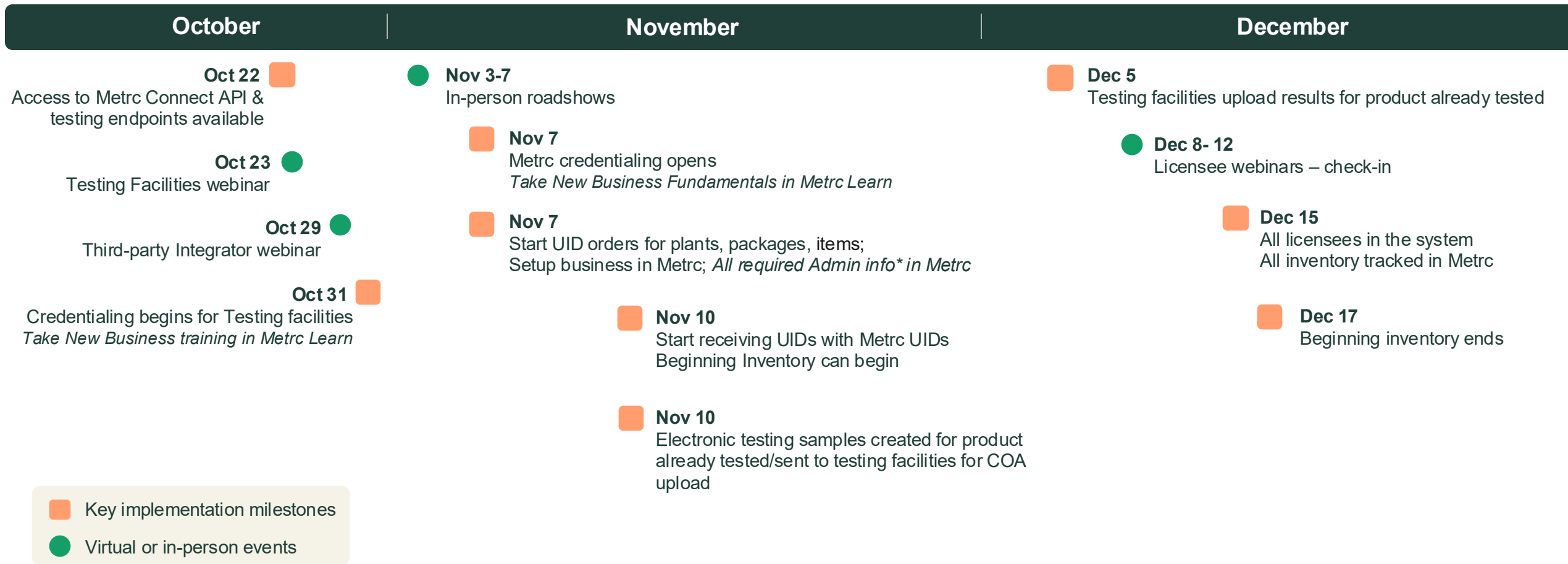
# Why track-and-trace?

*Track-and-trace technology at its core provides the ultimate transparency in a supply chain.*



# Implementation timeline – Beginning Inventory

This timeline is intended to guide a smooth transition and onboarding into the Metrc system. Updates will be posted on the Metrc New York State Partner Page and the OCM Seed-to-Sale page, with administrators also receiving regular email notifications.



\*Admin info – Strains, Items, Processing Jobs, Employees, Locations, Drivers

# Post Beginning Inventory timeline

December

January

February

March

## Dec 17 – Key milestones

- All licensees in Metrc.
- All product is tracked in Metrc.
- Metrc closes external transfer process for all license types. This prevents transfers from processors to distributors outside of the Metrc system.
- Processors must have test results for all packages through the virtual sample process for all products in inventory.

## Jan 16

Distributors can purchase Retail Item IDs to add to individual units in batch packages that are currently not associated for transfer to dispensaries after the February 28th deadline.

## Feb 15

All distributors should have assessed active inventory, by facility, for any product that does NOT have Retail Item ID codes affixed to each unit.\*

## 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.

## March 31

All inventory in Dispensaries must have a Retail Item ID affixed to each unit with associated testing results of either “TestPassed” or “RetestPassed”.

Key post implementation milestones

*\*For any product that does not have a Retail Item ID, distributors need to make a business decision on whether they can send the existing product to a dispensary prior to February 28 or purchase Retail Item IDs to affix to units.*

# Metrc implementation

Beginning inventory and  
post-beginning inventory  
timelines and milestones by  
licensed facility type

## **Important:**

If you hold multiple license types,  
please carefully review actions and  
timelines for each specific licensed  
facility type.

# Cultivator timeline & milestones

## Available now

Timing	Actions
November 7	<ul style="list-style-type: none"> <li>Register for Metrc Learn and complete New Business Fundamentals training.</li> <li>Get credentialed in the Metrc system.</li> <li>Set up your business and Admin dropdown (Employee permissions, etc.).</li> <li>Start ordering Plant and Package UIDs for existing plants and inventory.</li> </ul>
December 5 <i>Recommended date</i>	<ul style="list-style-type: none"> <li>If you are working with a third-party integrator, ensure you work with them to port over any existing information to your Metrc account.</li> <li>Any plants that have been harvested, Metrc recommends to wait until those harvests are in a bulk package for further drying and curing and associate Package UIDs to those bulk packages instead of tagging the harvested plants with Plant UIDs.</li> </ul>

## Upcoming deadlines

Timing	Actions
December 17 <i><u>Final due date</u></i>	<ul style="list-style-type: none"> <li>All existing plants and packages must be physically tagged with Plant or Package UIDs and recorded in the Metrc system.               <ul style="list-style-type: none"> <li>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.</li> <li>All packages must have a Package UID on each package.</li> </ul> </li> <li>Must add all employees in Metrc.</li> <li>All external transfers (beginning inventory transfers) must be complete at this time. This includes all new genetics for beginning inventory. You will be able to bring in new genetics after the beginning inventory period, but that will be a different process.</li> <li>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.</li> </ul>

# Processor timeline & milestones

## Available now

Timing	Actions
November 7	<ul style="list-style-type: none"> <li>Register for Metrc Learn and complete New Business Fundamentals training.</li> <li>Get credentialed in the Metrc system.</li> <li>Set up your business and Admin dropdown (Employee permissions, etc.).</li> <li>Start ordering Package UIDs and Retail Item IDs for existing inventory.</li> </ul>
December 5 <i>Recommended date</i>	<ul style="list-style-type: none"> <li>Complete the electronic sampling process for existing inventory that has already been placed in its final packaging and has already completed compliance testing.</li> <li>If you are working with a third-party integrator, ensure you work with them to port over any existing information to your Metrc account.</li> </ul>

## Upcoming deadlines

Timing	Actions
December 17 <i><u>Final due date</u></i>	<ul style="list-style-type: none"> <li>All existing inventory must be in the Metrc system.               <ul style="list-style-type: none"> <li>All packages must have a Package UID on each package.</li> <li>All units within each package must have Retail Item IDs on each unit.</li> </ul> </li> <li>Must add all employees in Metrc, including all Processor type 3 licenses and their employees that you work with in your operation.</li> <li>All external transfers (beginning inventory transfers) must be complete at this time.</li> <li>All electronic sampling processes must be complete at this time. All products leaving your facility must have a "TestPassed" or "RetestPassed" testing status in Metrc.</li> <li>Any product leaving your facility at this time must have both a Package UID on each package and a Retail Item ID on each unit prior to transfer.</li> </ul>

# Distributor timeline & milestones (Part 1)

## Available now

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

## Upcoming deadlines **Beginning Inventory period**

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

# Distributor timeline & milestones (Part 2)

## Upcoming deadlines

## Post-beginning Inventory period

Timing	Actions
January 16, 2026	<ul style="list-style-type: none"> <li>Distributors will have the ability to purchase Retail Item IDs in Metrc.</li> <li>Distributors should begin an inventory assessment, by facility, for any product that <u>does NOT</u> have a Retail Item ID QR code on each unit.</li> </ul>
February 15, 2026	<ul style="list-style-type: none"> <li>Distributors should have completed their inventory assessment, by facility, for any product that <u>does NOT</u> have a Retail Item ID QR code on each unit.</li> </ul> <p><b>Metrc recommendation:</b> Create a plan for products that do not have a Retail Item ID QR code on each finished good product package (or unit) ahead of the next milestone on February 28th. Distributors can either:</p> <ul style="list-style-type: none"> <li><i>Option 1:</i> Transfer product back to processors to have the Retail Item ID QR code added to the finished good product package.               <ul style="list-style-type: none"> <li><i>Note: If this option is selected, it is recommended that you proactively communicate with the processor for business planning needs.</i></li> </ul> </li> <li><i>Option 2:</i> Distributors can purchase Retail Item IDs for each unit and adhere them to the finished good product package.</li> </ul>
February 28, 2026	<ul style="list-style-type: none"> <li>Any finished good products leaving a distribution facility to transfer to a dispensary MUST have Retail Item ID QR code on each unit.</li> </ul>
March 31, 2026	<ul style="list-style-type: none"> <li>Any finished good products leaving a distribution facility to transfer to a dispensary at this time MUST have:           <ul style="list-style-type: none"> <li>A Retail Item ID QR code on each unit; AND</li> <li>A "TestPassed" or "RetestPassed" testing status associated to each package prior to transfer.</li> </ul> </li> </ul>

# Dispensary timeline & milestones (Part 1)

## Available now

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

## Upcoming deadlines Beginning Inventory period

Timing	Actions
December 17 <u>Final due date</u>	<ul style="list-style-type: none"> <li>• Must be credentialed into the Metrc system and have your business set up.               <ul style="list-style-type: none"> <li>• Other businesses need to be able to send transfer(s) to your dispensary location in Metrc.</li> </ul> </li> <li>• Must add all employees in Metrc.</li> <li>• Any product received at your facility at this time will have a Package UID on each package.</li> <li>• If all of your inventory is not yet in the Metrc system at this time, all incoming transfers will need to remain in the "Licensed Incoming Transfer" area until all of your 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.</li> </ul>
January 12, 2026 (new extended date)	<ul style="list-style-type: none"> <li>• All existing inventory must be in the Metrc system.               <ul style="list-style-type: none"> <li>• All packages must have a Package UID on each package.</li> </ul> </li> <li>• Must start reporting sales to Metrc.</li> <li>• All external transfers (beginning inventory transfers) must be complete at this time.</li> </ul>

# Dispensary timeline & milestones (Part 2)

## Upcoming deadlines Post-beginning Inventory period

Timing	Actions
February 28, 2026	<ul style="list-style-type: none"><li>Any package(s) received by your facility must have a Package UID on each package.</li><li>Any finished good products in package(s) received by your facility MUST have a Retail Item ID QR code on each unit.</li></ul>
March 31, 2026	<ul style="list-style-type: none"><li>All products received by your facility must have:<ul style="list-style-type: none"><li>A Retail Item ID QR code on each finished good product package (each unit).</li><li>A "TestPassed" or "RetestPassed" testing status associated to each package prior to transfer from a Distributor.</li></ul></li></ul>

### 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.

# Testing Facility timeline & milestones

Available now

Timing	Actions
November 7	<ul style="list-style-type: none"> <li>• Register for Metrc Learn and complete New Business Fundamentals training.</li> <li>• Take the Advanced Testing Facility training in Metrc Learn.</li> <li>• Receive Testing Facility resource materials (Advanced Testing Facility Training is a prerequisite)</li> <li>• Get credentialed in the Metrc system.</li> <li>• Set up your business and Admin dropdown (Employee permissions, etc.).</li> <li>• Start ordering Package UIDs for existing inventory.</li> </ul>
December 5	<ul style="list-style-type: none"> <li>• If you are working with a third-party integrator, ensure you work with them to port over any existing information to your Metrc account.               <ul style="list-style-type: none"> <li>• <b>Reminder:</b> LIMS integrators must go through the standard integration process. Please coordinate with your provider on the transition plan.</li> </ul> </li> </ul>

## Upcoming deadlines Beginning Inventory period

Timing	Actions
December 17 <i><u>Final due date</u></i>	<ul style="list-style-type: none"> <li>• All existing inventory must be in the Metrc system.               <ul style="list-style-type: none"> <li>• All packages must have a Package UID on each package.</li> </ul> </li> <li>• Must add all employees in Metrc.</li> <li>• Any product received at your facility at this time must have a Package UID on each package.</li> </ul>

# Getting started with Metrc

*Your first steps in getting credentialed into the system.*



**1**

**Sign up for New Business Training.** To begin with Metrc, all new users must create an account in [Metrc Learn](#).

**2**

**Complete New Business Fundamentals Training in Metrc Learn.** Once you complete the training and pass your assessment, your information will be sent to Metrc Support.

**3**

**Receive log in credentials from Metrc.** You will receive an email from Metrc containing user credentials for the Metrc system.

**4**

**Validate credentials by logging in.** Log into Metrc within 72 hours of receiving your welcome email and begin working in Metrc.

**5**

**Continue to improve your use of the Metrc system.** Visit [Metrc Learn](#) to find additional resources on how to navigate Metrc.

# 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.



## 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

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).

# Metrc Support

*The Metrc team is here to help!*

Every question and conversation counts, and our dedicated support team is here to help.

Our support teams have been with us for a long time – they know and love the industry – so whether you are seeking help navigating the Metrc system, facing technical challenges, or have a general inquiry, we take every interaction seriously and do everything we can to find a resolution quickly.

You can access Metrc Support by phone or online through our Metrc Support portal, which offers the ability to:

- Create a new support case
- View real-time case status
- Live chat with a Metrc Support agent
- Access help documentation and articles

To sign up for the portal, ensure you have Metrc system access.

Scan this QR code  
to access the portal



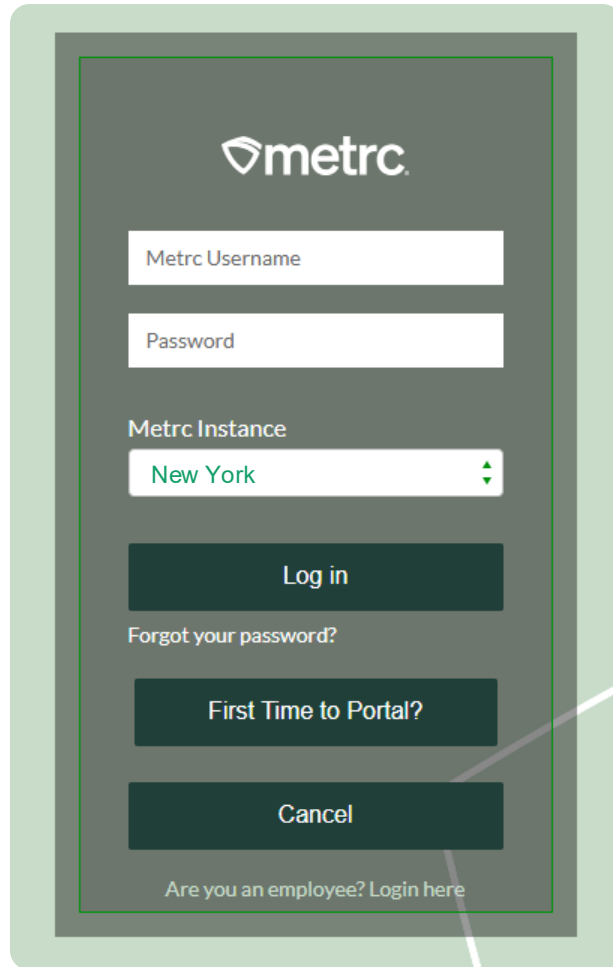
Live chat or online via  
the [Support Portal](#)



Phone: **877-566-6506**

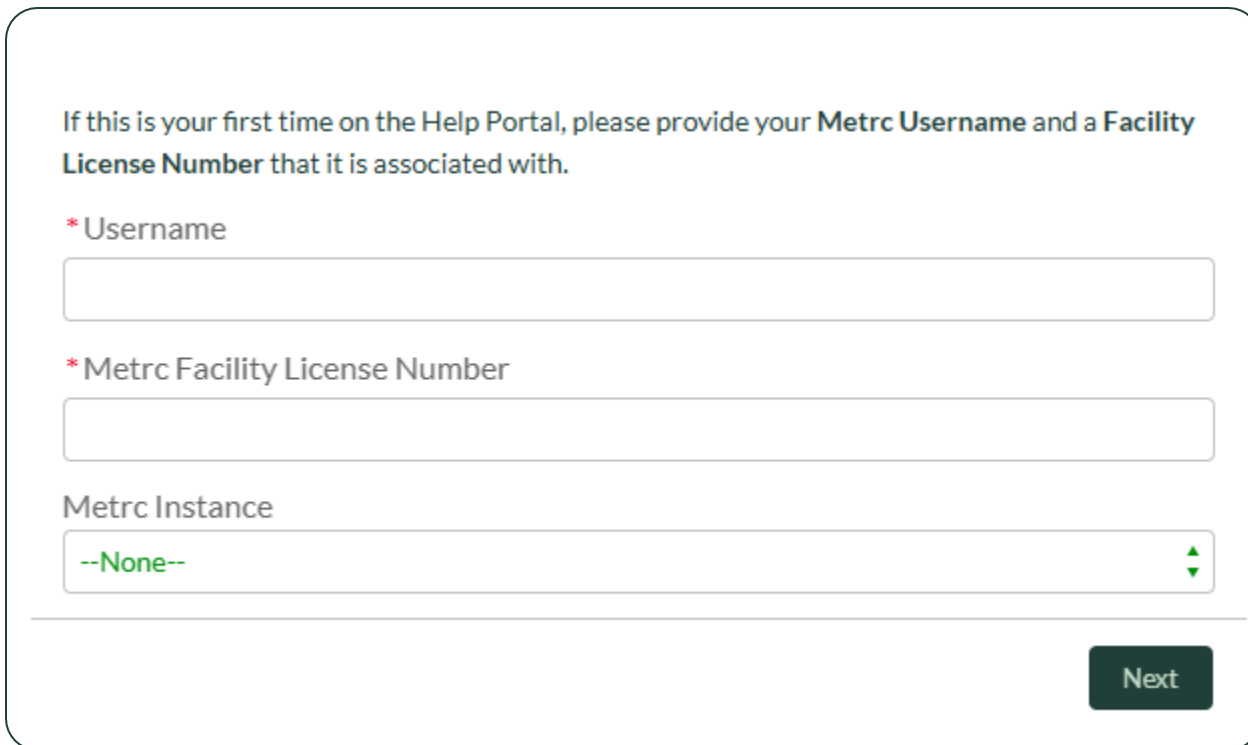
# Access the Support Portal

*Login page and first-time users*



A screenshot of the Metrc login page. The page features the Metrc logo at the top. Below the logo are three input fields: 'Metrc Username', 'Password', and 'Metrc Instance' (with 'New York' selected in a dropdown menu). There are three buttons: 'Log in', 'First Time to Portal?', and 'Cancel'. At the bottom, there is a link that says 'Are you an employee? Login here'.

Complete this form to access the Metrc Support portal



A screenshot of the Metrc registration form. The form is titled 'Complete this form to access the Metrc Support portal'. It contains a message: 'If this is your first time on the Help Portal, please provide your Metrc Username and a Facility License Number that it is associated with.' Below this message are three input fields: '\* Username', '\* Metrc Facility License Number', and 'Metrc Instance' (with '--None--' selected in a dropdown menu). A 'Next' button is located at the bottom right of the form.

# Sharpen your Metrc skills

*Access Metrc Learn, our interactive training resource with 300+ courses*

- ✓ On-demand training available 24/7
- ✓ System functionality training, by facility type
- ✓ Easily track and share your progress
- ✓ Available on-the-go through a mobile app



# Access help right in the Metrc system

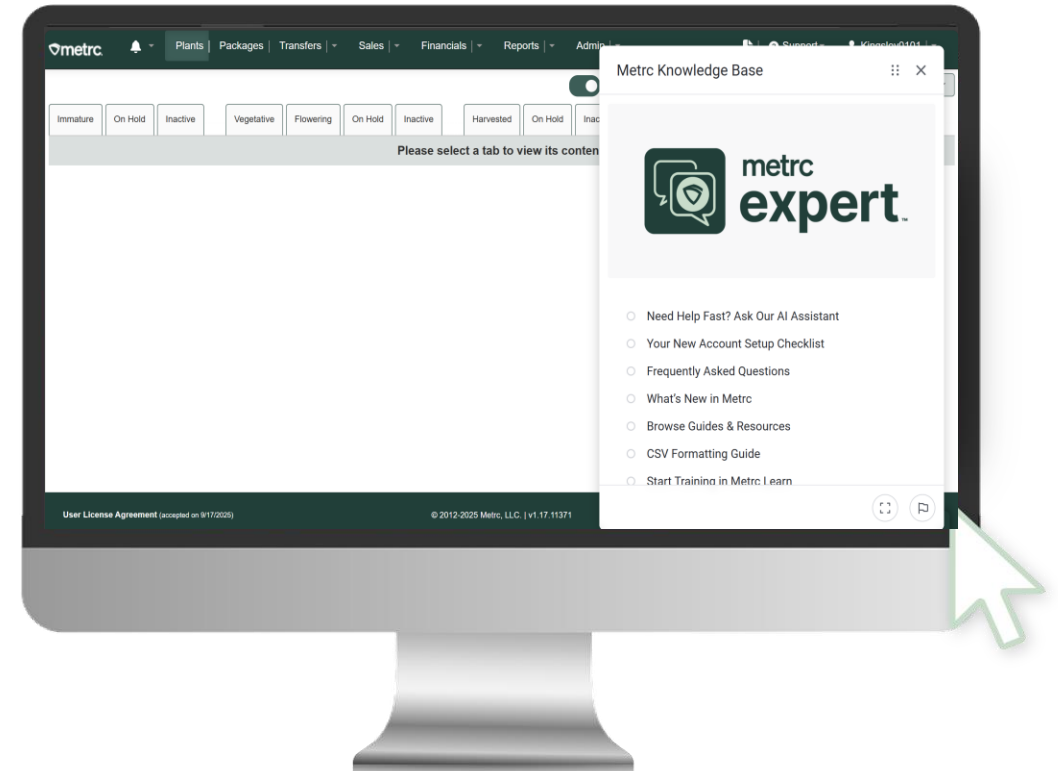
## Metrc Expert

### knowledge base

An innovative state-specific knowledge base is accessible through a widget in the Metrc system.

Leveraging AI, as you interact with the tool and ask questions, it will drive automated responses and deliver personalized customer support with faster responses.

- ✓ Access knowledge base resources directly in the system
- ✓ Minimized disruption to workflows
- ✓ Answers to your questions in seconds
- ✓ Generate a support case or live chat with Metrc Support if further help is needed





# Metric tracked inventory

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

Type	Description	Use case	Cost	Who can order
<b>Plant UID</b>	<p>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.</p> <p><b>Use of third-party RFID solutions is optional.</b></p>	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
<b>Package UID</b>	<p>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.</p>	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>	<p>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.</p>	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)

# Questions?

Reach out to Metrc Support



Phone: 877-566-6506



Live chat or online via the  
[Support Portal](#)