Industry Generic User Guide

The Metrc User Guide 2019 Version 9.0

The Metrc system was developed in accordance with the State and the State's rules and regulations governing the Marijuana Industry. The State is tasked with the regulation of the State's two marijuana industries (Medical and Retail), the State is responsible for providing the rules under which these industries are expected to operate. All rules are written in response to the direction and authority provided by state statute. These rules are put in place in accordance with the State's rules and regulations. For specific questions regarding rules and regulations Metrc users should refer to the State. Operational questions regarding Metrc can be addressed with Metrc LLC.

Please note the State has made several rules with regards to who may and may not access the Metrc system. The regulations define many aspects of the responsibility of who is allowed in Metrc, what they are allowed to do while in the Metrc system and what they are responsible for when they have entered information into the Metrc system. The Metrc manual is a reference tool for those people who are lawfully allowed to actively use the system and have received proper credentials under the enforcement division's rules and regulations. It is assumed that all users of the Metrc manual have read, understand and are compliant with these rules and regulations.

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Overview of Metrc

Metrc stands for Marijuana Enforcement, Tracking, Reporting and Compliance. Metrc is a State Mandated Tracking and Reporting Software to chart your chain of custody for your Marijuana and Marijuana Infused Products from seed to sale.

The Metrc™ Compliance Management System allows a licensee to track all of the Marijuana inventory grown, processed, transferred and sold for either medical or recreational use. The Metrc system consists of a web application, web services, a mobile application for site inspection, and a mobile application for industry use. Metrc can integrate with other systems for retrieving information such as licensing or tax from Departments of Health or Revenue or third-party systems through the use of the Metrc API.

The goal of the Metrc system is to:

- Capture perpetual inventory quantities for each Licensee.
- Track and record a chain of custody from “starter” plant to patient or consumer acquisition.
- Provide the inspection process with the tools necessary to complete onsite validation of inventory.
- Support the auditing process from a series of exception reports.
- Provide the industry with the means to report the required inventory events.

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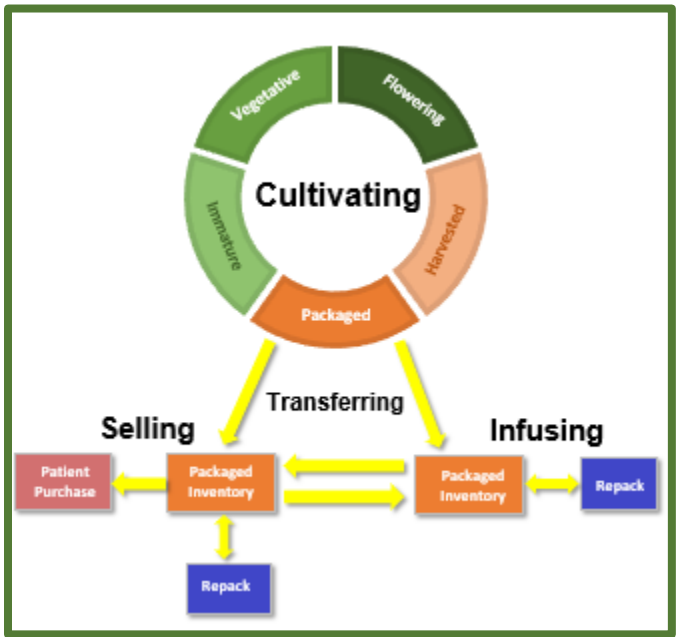
Life Cycle

The graphic below is what we call the Marijuana Life Cycle. This picture graphically depicts the scope of the Metrc system and how Metrc interacts with the industry. The intention of this slide is to help users understand how the Metrc system was designed and how each process is captured and moved through the industry.



The Steps

1. Cuttings, seedlings, or clones are grouped and identified as an immature batch.
2. An immature plant becomes a vegging plant when the plant reaches your state's required tagging height for Vegetative plants. A unique RFID tag is assigned to the vegging plant.
3. A vegging plant becomes a flowering plant when the light cycle changes to 12 hours on 12 hours off.
4. Harvesting is the process of cutting down a plant and obtaining the wet weight before initiating the trim process. It is performed only on plants in the flower phase creating the harvest batch.
5. Marijuana in the form of buds or shake/trim (by weight) may be packaged and sold or processed into hash or infused product. A Unique RFID label is assigned to the package.
6. Packaged inventory is transferred to an infusing business by its own cultivation or from another selling business for the purpose of producing infused products.
    a. An infusing business will repack its infused product for transfer to a selling business. A unique RFID label is attached to the package.
7. Packaged inventory is transferred to a selling business by its own cultivation, another selling business or from an infusing business, for the purpose of selling inventory.
    a. A selling business will repack inventory for transfer to another selling or infusing business. A unique RFID label is attached to the package by the transferring business.
8. A selling business will sell from packaged inventory.

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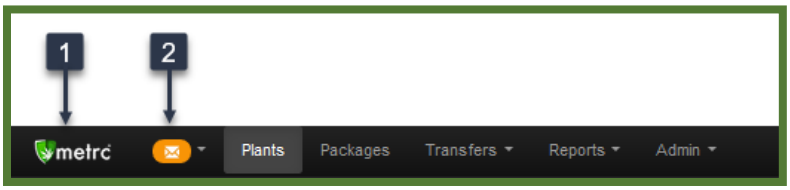
Navigating in Metrc

Navigating in Metrc is similar to navigating in a traditional website. Metrc uses tool bars, drop down menus and only requires the use of a mouse to navigate and perform functional tasks. The two primary tools bars in Metrc run along the top of the site and in the upper right corner.



Item 1: Metrc Navigation Bar

The Metrc Navigation Bar is the long black bar that runs from left to right at the top of your screen when you're logged into Metrc. You will select from the various options on this bar to conduct your data entry.

Item 2: Information Envelope

The Information Envelope on the far left of the navigation bar will display Metrc Support holiday hours and/or closures, the number of expiring or expired Patients registered at a store, and other important information.

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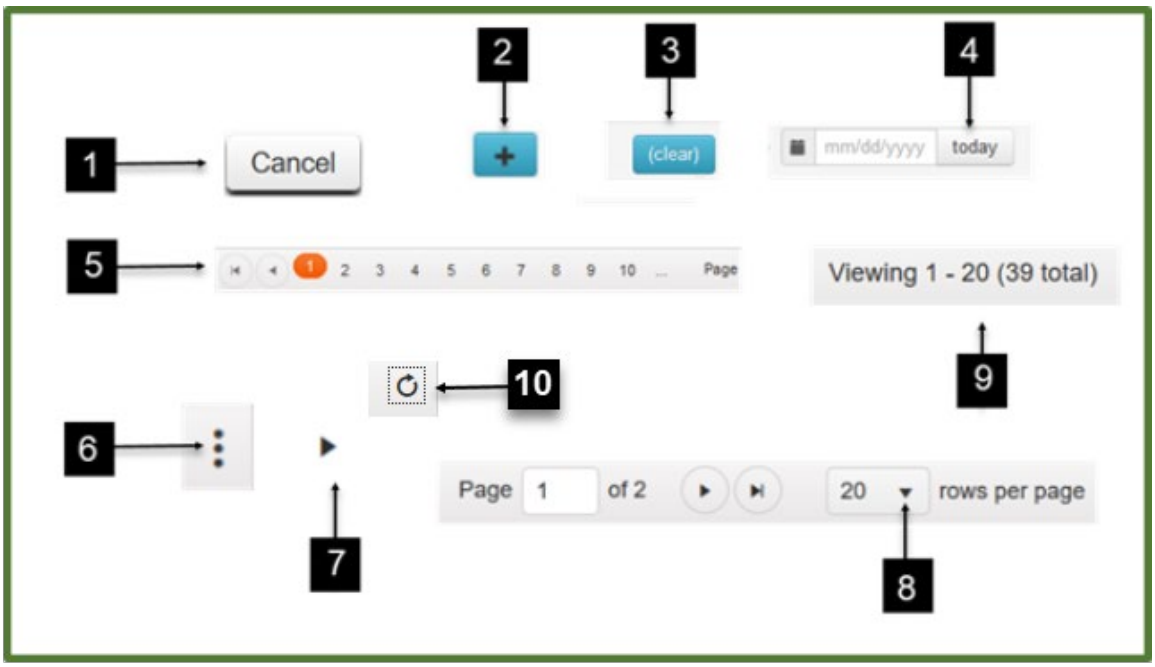
Common Buttons in Metrc



Item 1: Cancel button

The cancel button will cancel the operation prior to saving information in the field you are working in.

Item 2: Add button

Plus button is used to edit multiple action reasons simultaneously.

Item 3: Clear button

The Clear button will remove all data fields from the menu you are working in, prior to completing the transaction.

Item 4: Today's Date

The Today Button will enter the date for the day your computer is set to.

Item 5: Page View

This function will show you the number of pages this area has available to use. It is used in conjunction with the items per page.

Item 6: Filter

The Filter Button denotes a date field you can search (See search function topic).

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Item 7: Drop-Down Arrow

The Drop-Down Area denotes a field that has more data available for viewing. Plants, Packages, Transfers are common areas where this feature is available.

Item 8: Viewing Indicator

The viewing indicator will tell you how many items you are viewing and how many are available to be viewed.

Item 9: Items per page

The items per page will tell you how many items per page you are currently viewing. You can view 5, 10, 20, 50, 100 per page.

Item 10: Refresh

The Refresh Button is found in the lower left corner and will refresh the data on a page.

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Licenses & Permissions

	Grow	Processor	Store	Transporter	Testing Lab
Admin	✓	✓	✓	✓	✓
Packages	✓	✓	✓	✓	✓
Patients			✓*		
Plants	✓				
Reports	✓	✓	✓	✓	✓
Sales			✓		
Transfers	✓	✓	✓	✓	✓

*Patients is only an option on the navigation bar for medical stores in certain states.

Grow

Functions available on the navigation bar for Grows include: Admin, Packages, Plants, reports, and Transfers.

Processors

Functions available on the navigation bar for Processors include: Admin, Packages, Reports, and Transfers.

Stores

Functions available on the navigation bar for Stores include: Admin, Packages, Patients*, Reports, Sales, and Transfers.

Transporters

Functions available on the navigation bar for Transporters include: Admin, Packages, Reports, and Transfers.

Testing Lab

Functions available on the navigation bar for Testing Labs include: Admin, Packages, Reports, and Transfers.

Please verify your Web Browser settings prior to working in Metrc. Security and firewall settings may impact your performance in Metrc.

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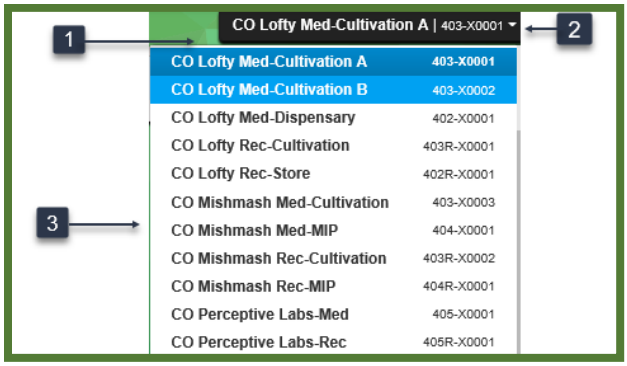
Working In/Switching Between Facilities

In the upper right-hand corner, select a facility from a list of facilities. In this drop-down menu, you will see a list of companies created by the Facility Admin shown in the picture below. While you are working in the Metrc system, you will need to be clear on the facility you are working in. In the Metrc system, each facility is a business in and of itself and operations are limited to that particular facility.



Item 1: Current Facility

This is the facility in which you are currently working. If your organization only has one facility, or if you are an employee who will only have access to one facility, that facility/location information is what you will see here.

Item 2: Drill Down Arrow

If your organization has multiple facilities and you have access to more than one of them, a Drill Down Arrow will be available to the right of the facility information. You will click on this to populate the list of facilities to which you have access.

Item 3: Other Available Facilities

Once the list has populated, you can toggle between facilities, clicking to select the facility you need to work in. The selected facility will then appear as the Current Facility.

As examples of this, a person working in Metrc should be aware:

- If you are an employee of a single facility, you will only see one option.
- If you are an employee of multiple facilities, you will need to select the facility you are working in.
- A medical business and a retail business are considered two different facilities, even if they are in the same building.
- The options in the navigation bar will be based on employee permissions and the facility type.

Also, note that additional kinds of hardware such as RFID reader devices and bar-code scanners are not required to work in Metrc. A standard mouse connected to your device is sufficient to perform all functional tasks in Metrc. Additionally, any PC, Laptop or tablet device with internet access can access the Metrc site.

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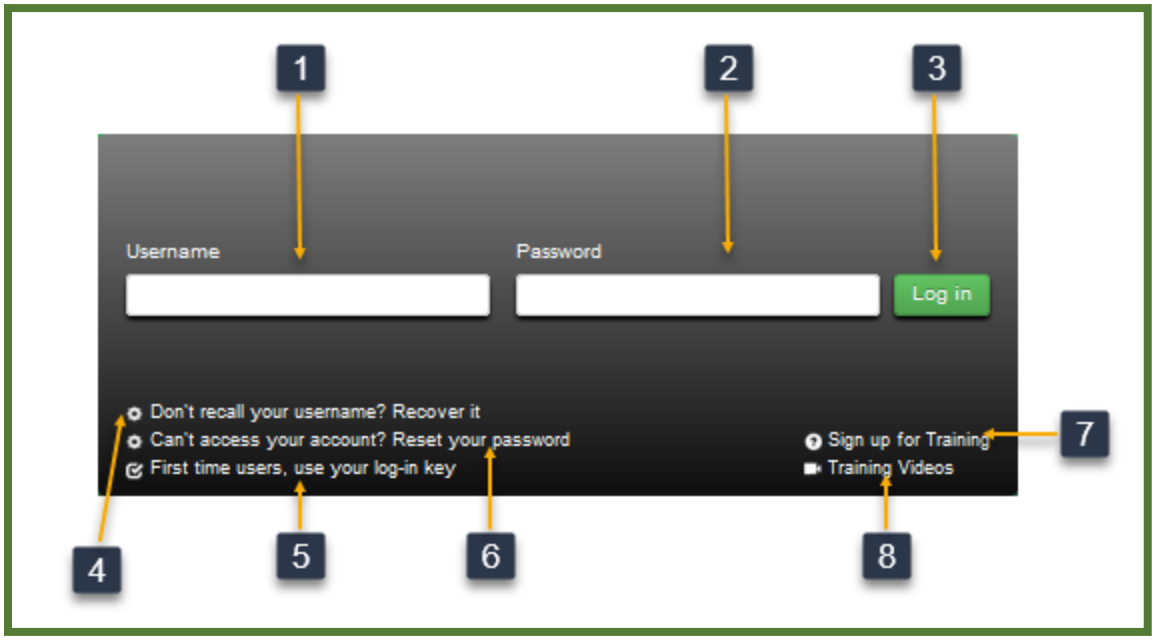
Log-In Screen



Please note, the Commission has made several rules with regards to who may and may not access the Metrc system. The regulations define many aspects of the responsibility of who is allowed in Metrc, what they are allowed to do while in the Metrc system and what they are responsible for when they have entered information into the Metrc system. The Metrc manual is a reference tool for those people who are lawfully allowed to actively use the system and have received proper credentials under the enforcement divisions rules and regulations. It is assumed that all users of the Metrc manual have read, understand and are compliant with these rules and regulations.

Item 1: Username field

The username will be your State-issued Badge Number, Handler's Permit, or Agent ID provided by the state.

Item 2: Password field

Password requirements for Metrc, at least:

- 1 Upper case letter
- 1 Lower case letter
- 1 Number
- 1 Special character such as a dollar sign, pound or symbol

You are not limited to the number of each you use but must contain at least one of each of the required letters or symbols.

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Item 3: Log in button

Once you have entered your user name and password you will be able to log into Metrc.

Item 4: Recover Username

Recover Username is used if you do not remember your username.

Item 5: First Time User

First time user link is for first time users to be able to click and enter their first-time key that was given in their welcome email.

Item 6: Reset Password

Can't access your account link is for when you can't remember your password, you may click the link and it will send you a password reset to your email of record. Please make sure you enter your username first.

Item 7: Sign Up for Training

Sign Up for Training is a link to be able to sign up for training classes.

Item 8: Training Videos

Training Videos is a link to the step-by-step YouTube videos that are located on Metrc's web site.

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Metrc Administrator

The roll of the Metrc administrator is to create all of the initial operational functions of a licensed business and make sure employees get training on the use of the Metrc system. Metrc provides ongoing training and support to supplement the business owners' efforts. This includes a New Business/New Employee Training and an Advanced Metrc Class every week.

To assist the administrator, all of the administrative functions in Metrc can be delegated with the exception adding facilities. The addition of new facilities is the sole capability of the Metrc administrator.

To get started as an Admin in Metrc, upon completion of training, a business owner should send an e-mail to support@metrc.com with the following information:

- The Name of the business and DBA if there is one
- The Business License number
- The Owners name
- The Owners badge number/handler's permit or date of birth
- A valid email address

If your state has unlicensed users, then please include your Date of Birth and phone number as well.

The owner may also appoint another employee as their Key Administrator, however the owner must email support@metrc.com and provide the information above for that employee. However, the owner will need to be added in as a regular employee with full permissions.

The Metrc support team will provide an e-mail response with your credentialing response information. Email responses will be sent explaining that your request will be completed within 48 hours Monday - Thursday. Email requests sent in on Friday will be completed on Mondays.

All other Employees – a welcome email will be sent to you after your Metrc Administrator sets you up in Metrc as an employee. Check your email inbox for the welcome to Metrc email. If you do not receive this, check with your Metrc administrator; they have the ability to resend your welcome email at any time.

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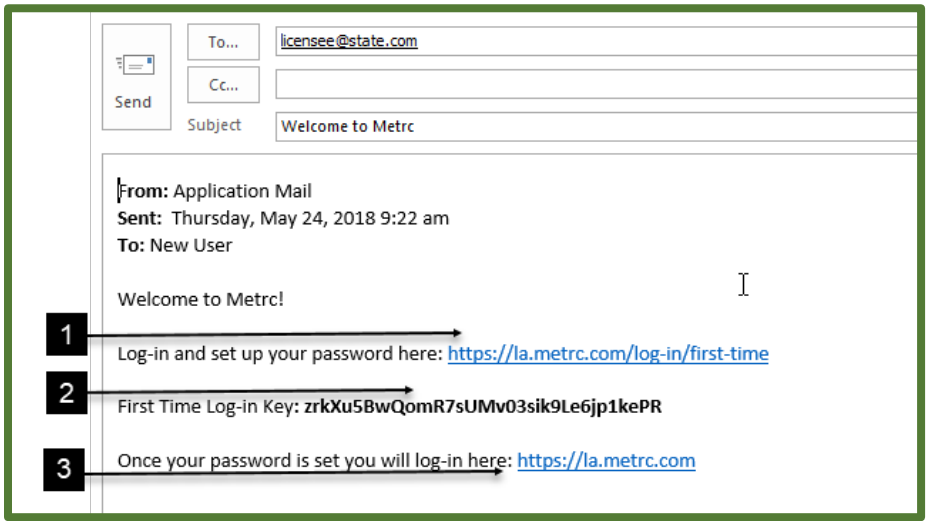
Welcome to Metrc email - Example

First Time Credentialing Example:

As soon as the State Administrator enters you in as an employee in Metrc, you will receive a "Welcome to Metrc" email from support@metrc.com and will have two links to the log-in website.

- The first link will redirect you to the state website and automatically add the security key into the log-in screen.
- The second link is provided to allow the user to create a short cut or web link for future use.



Item 1: Log-in Link

This link will take you to your log-in page where you can begin to log into Metrc.

Item 2: First Time Log-in Key

This key is your temporary first-time log-in key that can only be used once. Also, it is only good for 24 hours.

Item 3: Site Link

Use this link to create a book mark.

Please note:

- Be sure to check your email settings and your spam/trash folder. Your settings may prevent you from seeing the email.
- The welcome email with the First-Time log-in key is only good for 24 hours and will then become invalid for security purposes.
- If you have trouble with your Metrc login, you may request another security key by contacting the state administrator.

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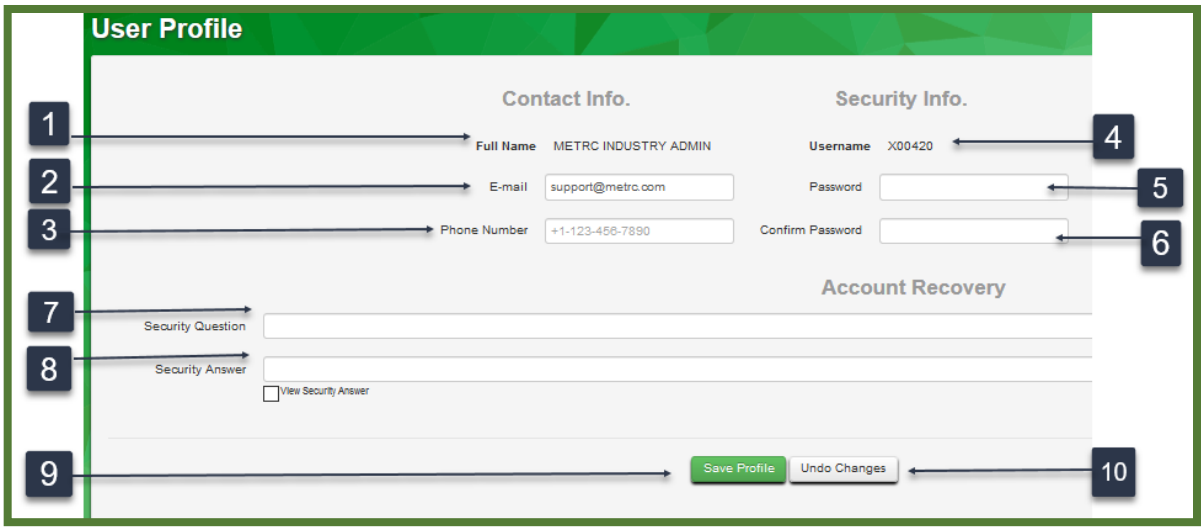
User Profile



User Profile is where you will set up your Metrc Log-in information, enter your email address, phone number, change your password and set up your security questions.

Item 1: Full Name

Your full name information is already set up in the system by the facility Admin when your profile is created.

Item 2: Email

You can enter and change your email in this section.

Item 3: Phone Number

You can enter and change your phone number in this section.

Item 4: Username

Your username will be a badge issued by the State.

Item 5: Password

This is where you can set up and change your password.
Password requirements, at least:
1 upper case letter, 1 lower case letter, 1 number, and 1 special character

Item 6: Confirm Password

You will need to confirm your password when you are setting it up for the first time and/or

when you are changing the password.

Item 7: Security Question

You can create your own security question so that if you ever forget your password you can answer your security question and be able to log-in to Metrc.

Item 8: Security Answer

You can answer your security question in this box. Your security question and answer can be used if you ever forget your password.

Item 9: Save Profile button

The Save Profile button is used to save all the changes that you have entered to your User Profile.

Item 10: Undo Changes button

The Undo Changes button is used to clear all the changes that you had previously entered in this current session.

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Initial Account Setup

Metrc has created a step by step process that will ensure a licensee captures all of the necessary requirements and information into Metrc. Setting up a facility in Metrc follows a logical process designed around the common business practices of the Marijuana Industry. When setting up your Metrc system, it is important to follow this process to minimize data input and maximize accuracy. Remember, all information created in Metrc is in a live system and subject to review by the State.

Facility Step by Step Setup Process:

1. Receive Metrc Administrator credentials (See First-Time Credentialing in this guide)

2. Add Facilities/Locations (Under the owner's profile area on the far right of the navigation bar)

3. Select Facility/Location

4. Under Admin on the navigation bar, add:

    a. Tag Orders

    *Tags must be ordered from each individual license.

    b. Rooms

    c. Strains

    *Employees and Strains may be added to multiple facilities at once across license types.

    d. Items

    *Items must be entered in each individual license.

    e. Employees

5. When tags arrive, receive tags digitally in Metrc from the Tag Orders screen, then begin entering plants and/or packages information.

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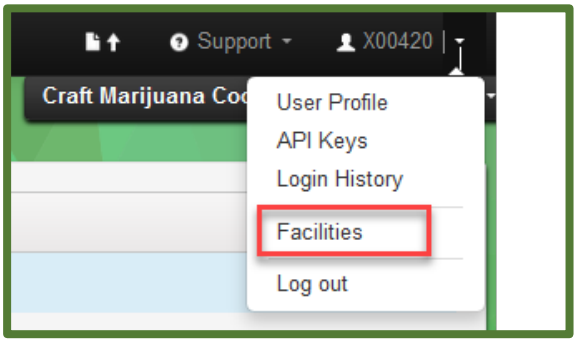
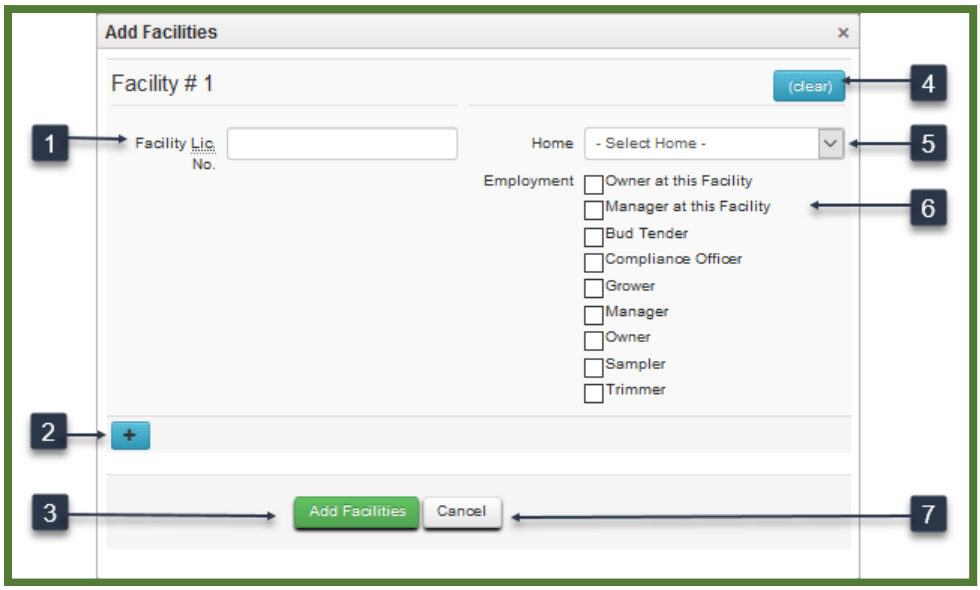
Add Facilities

Adding Facilities is a function that is uniquely required of the Metrc Key Administrator. Only a Metrc key administrator is allowed to add a facility and therefore a Metrc key administrator should complete the addition of all facilities before any other data is entered.

To Add Facilities/Locations, this can only be done by the Key Administrator. You will do so under the Profile area on the far right of the navigation bar. You will click on the drop down caret and then choose Facilities.





Item 1: Facility License Number

This is the facility business license number issued by the State. The location and contact information are provided by the State license software and cannot be changed or altered by Metrc.

Item 2: Add button

Multiple facilities may be entered at one time. By selecting the add button, an Admin may add multiple facilities at the same time on this screen.

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Item 3: Add Facilities button

Click this button to save your data and exit.

Item 4: Clear button

The clear button allows you to erase all data entered and begin again if the user has a mistake.

Item 5: Home page

Select a home screen for the facility. This will be the first screen that will appear for the Metrc administrator login. Selection of the home screen does not impact the ability to move within the different areas of Metrc; it is simply a function put in place to allow for easier or more convenient access for the user. Please keep in mind that the Home page must match at least one permission.

Item 6: Employment

Employment is where you can select the employee's status at the facility.

Item 7: Cancel button

Click this button to cancel your data entries, without saving, and exit the screen.

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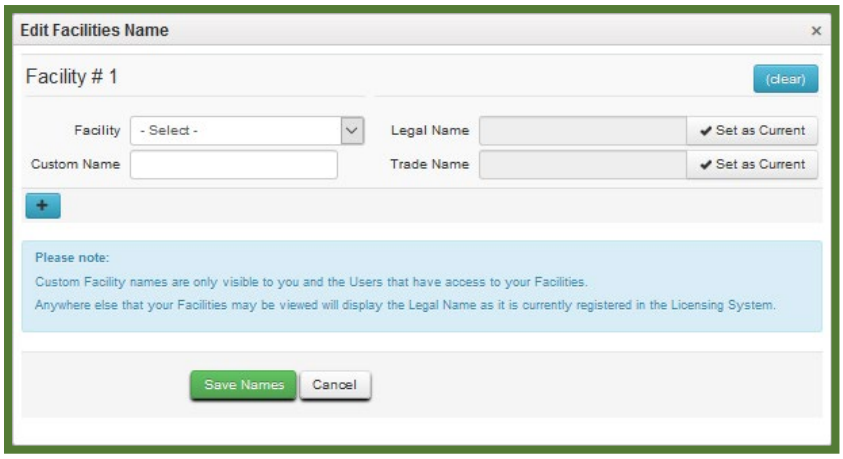
Editing Facilities

You are able to give your facilities an *ALIAS* name or nickname that will appear in the black dropdown facility box. To facilitate this function, we have an “Edit Facilities” button in the Add Facilities/Locations screen. This is located under the down caret as shown on page 20.

This nickname feature will only be visible to you and those employees with *Metrc* access within your facility. Transfer manifests will continue to show the legal name only.

<u>Instructions on Changing Your Facility Name</u>

- You can change your facility name by selecting Admin/Facilities from the top navigation menu, then highlight the facility you want to rename and click Edit Facilities Name button. You can also just click the Edit Facilities Name button and use the Facility dropdown box, on the left side of the form, to select the facility you want to rename.
- Next, type in the alias/nickname you would like to use for this facility and click the green Save Names button.
- Note: The Legal name box on the right side of the form is populated with the legal name in the State licensing database. If you decide to go back to the legal name at any point, simply click on the “Set as Current” box.
- The Trade Name box will be used in the future to show the DBA name associated with your legal name. For now, this will be unused.

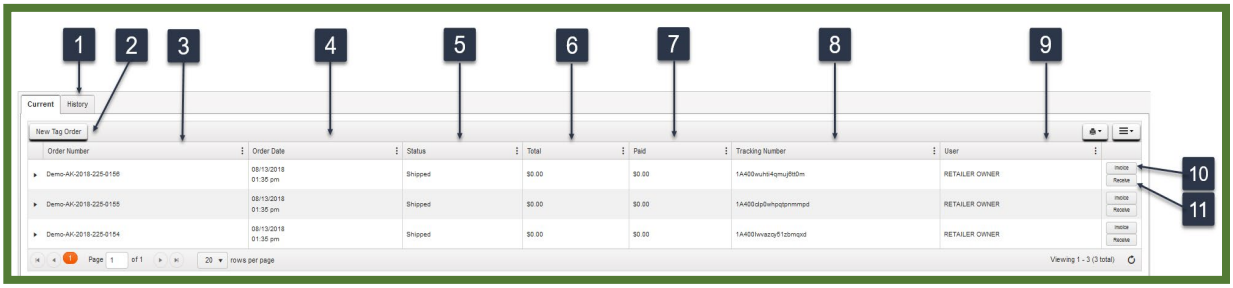


Tag Orders

Ordering Tags in Metrc is a simple process however it is very important to pay close attention when placing your order. Once a tag order is submitted it can only be canceled before 7 pm CST on the day that you place the order. Metrc tags are custom printed for each facility and cannot be returned once the printing process has begun and are non-refundable; so, it is strongly advised that you be sure orders are placed for the correct facility, amount and type of tags required.

Additional notes about tag ordering:

- Tags are ordered from the Admin function
- Tags can be ordered via Credit Card, check or money order
- Payment information is not required to be the licensee or the business owner
- Each facility must have billing information entered. You can choose to ship to a different location (No PO Boxes).
- Tags will be sent by UPS.
- Tag costs are listed in your State's Supplemental under the Support Tab.
- You can request expedited shipping if you would like at an additional expense. The options are UPS Next Day Air and 2nd Day Air. In some areas UPS will deliver on Saturday's, this is an additional expense on top of the Expedited charge. Please contact the support line at support@metrc.com or 877-566-6506 to expedite your tag order as soon as you have completed the order.
- Please note if you place an order for Expedited Next Day or 2nd Day air it will not print or ship until the next <u>business</u> day. For example: An order placed on Monday will print and ship Tuesday arriving Wednesday with Next day air or Thursday with 2nd day air. If you order on a Thursday it will print and ship Friday and arrive Monday with Next Day Air or Tuesday with 2nd Day air. Nothing will ever print or ship of the day of an order. All orders are printed on Monday through Friday. No printing or shipping on weekends or major holidays.



Item 1: Order History

This will show all of the details on previously placed orders. See tag order history screen for more details.

Item 2: New Tag Order button

New Tag Order button is used to begin a new tag order process.

Item 3: Order Number

Order Number shows the specific Order Number created once the order is completed.

Item 4: Order Date

Tag Order Date shows the time the order was placed into Metrc.

Item 5: Status

Status shows the current status of an order. Order status can be: Pending (waiting on payment), Paid, Printing, Printed or Shipped.

Item 6: Total

Total is the total amount of the order including shipping.

Item 7: Amount Paid

Amount Paid is the total amount paid for the Tag Order.

Item 8: Tracking Number

Tracking Number will display the UPS tracking number(s) of the order.

Item 9: User

User shows the name of the person who placed the order.

Item 10: Invoice button

Invoice will download a PDF of the tag order's invoice.

Item 11: Receive

When orders have been shipped and physically received you will need to receive the tags into your Metrc account by selecting the receive tags button. By selecting this button, the tag ID numbers will show in your Metrc account in the pull-down menus in the tag areas.

Note:

- When an order has just recently been placed, there will also be a Payment button and a Void button.
- Payment button: Allows you to select or alter the method of payment up until it says "printing" on the tag order screen.
- Void button: Void button is used to void a current order. If you choose to void a tag order it must be done before 7pm CST on the day that you place the order.

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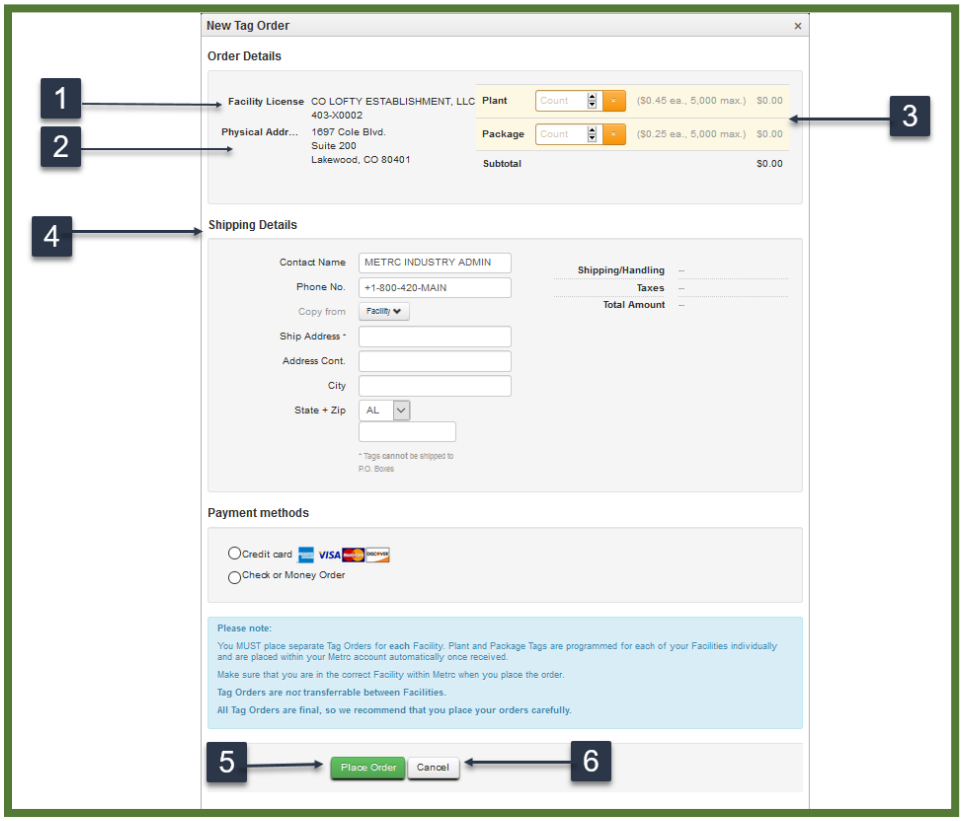
New Tag Order



While ordering tags in Metrc is a straightforward process, it is important to pay close attention and check your information before placing an order. Metrc tags are custom printed for each facility; as such, orders cannot be cancelled once the printing process has begun and are non-returnable. Pay close attention to the facility, amount of tags, and type of tags being ordered, double-checking your information before hitting the Place Order button.

Item 1: Facility License #

Facility License # will be auto-populated based on the facility you are currently working in.

Item 2: Physical Address

The Physical Address of the facility is auto-populated with the facility address on file with the State.

Item 3: Plant and/or Package Tag Amount

Enter the number of Plant Tags you'd like to order (Cultivations only) and/or the number of Package Tags you'd like to order.

Item 4: Shipping Details

Enter your preferred shipping address.

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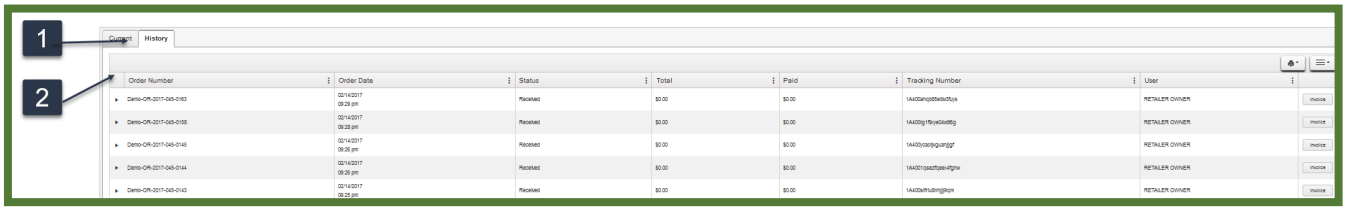
Item 5: Place Order button

Click the Place Order button after you have verified your information is correct to submit the order.

Item 6: Cancel button

Click this button to exit the screen without saving any data.

Tag Order History Screen



Item 1: Current/History Tab

Current Tab is used to show current tag orders that have been placed but not yet received. By selecting the History tab, you will be directed to a screen where you can see all activity for previous orders that have been received.

Item 2: Historical Information

Included in the History is the Order Number, Date, Status, Price, Tracking Number and the person who placed the order.

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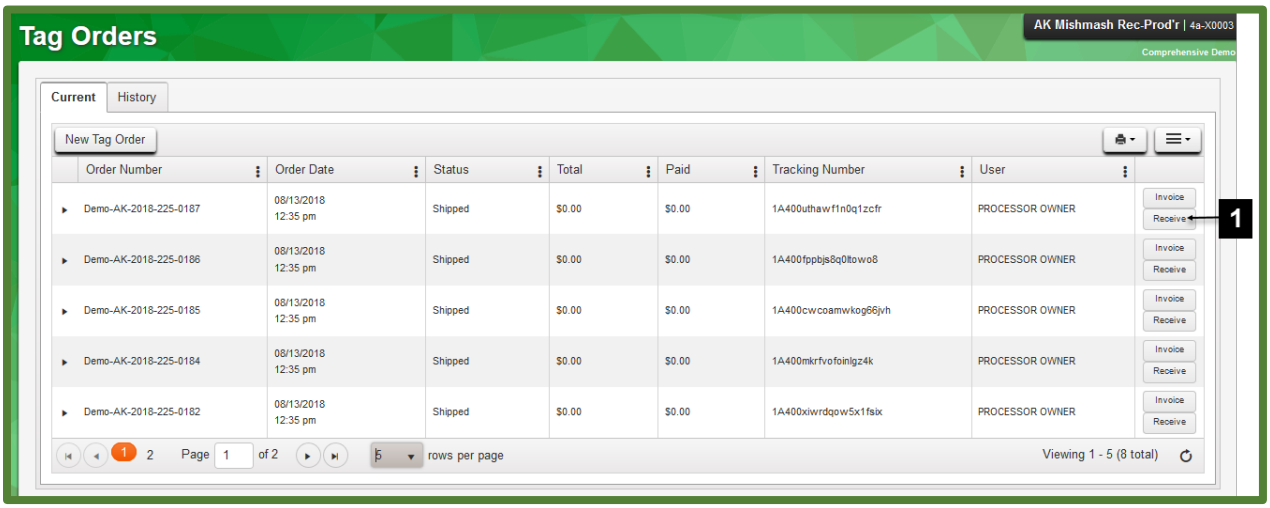
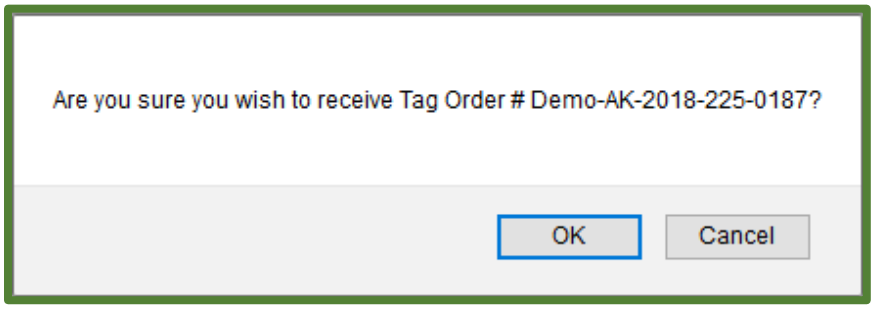
Receiving your Tags into Metrc

As a security feature to ensure physical tags are not diverted before they reach you or used by anyone other than the licensee who ordered them, your tags will not automatically populate in the system as the order is placed. Once your tag order has shipped, a “Receive” button will populate in the Tag Orders area of the system as displayed below. When your tags arrive, select the “Receive” button for the order to populate the tags in the software.



Item 1: Receive button

Select this button once your tags have physically arrived. After selecting the receive button, a confirmation window will appear prompting you to confirm receipt of your tag order.



Tags Available/Used/Voided

Under the Admin tab, you will see a “Tags” option under Tag Orders. If you select Tags, it will bring you to your Tags screen. This screen will display all available, used, and voided tags for your facility.

Item 1: Available Tab

The Available Tab shows the tags available for you to use.

Item 2: Used Tab

The Used Tab shows the tags that have been assigned to product already and are not available to use.

Item 3: Voided Tab

The Voided Tab shows the tags that have been voided.

Item 4: Tag

The tag column displays the full plant or package tag number.

Item 5: Type

The type column displays the type of tag (plant or package).

Item 6: Status

The status column shows the status of the tag (Received, Used, Voided).

Item 7: Commissioned

The Commissioned column shows the date that the tags were commissioned (printed and sent out).

Item 8: Void

The Void button can be used if a tag is lost or damaged beyond use and needs to be voided. This will move the tag to the Voided tab.

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Rooms Function

A room is designed to be a physical location to identify where product is located. The room does not necessarily need to be a room but may also be a location within a given room. As an example, if a grow is small and only has one room it may classify multiple areas of a room such as "Row 1, Row 2, Row 3". An additional example, a large grow that may have a large room holding several phases of plants of the same strain may choose to use "Veg Room Section 1, Veg Room Section 2, Veg Room Section 3" to provide a specific location for a group of plants of the same strain in a different phase in a single room. As one final example, a group of plants may change phases in the same room and the room continues to change phase making the room and the plants track together up and through the harvest phase. In this case, a room can almost act as a batch.

When setting up your rooms, it will be important to keep in mind the ability to move plants by room and phase. The Rooms function provides an easy way to move product in large volumes and the room feature can assist in minimizing the efforts in these moves. Rooms can be added, deleted or edited very easily and as often as desired.

Item 1: Add Rooms button

To add a room simply select the add rooms and a new window will open.

Item 2: Edit Rooms button

Your room name can be any "location" name that you would like to utilize.

Item 3: Discontinue

Use this button to permanently remove a room from your list.

Room Layout

The following graphics show two concept layouts of how rooms could be laid out in Metrc to work with the Changes by room function.

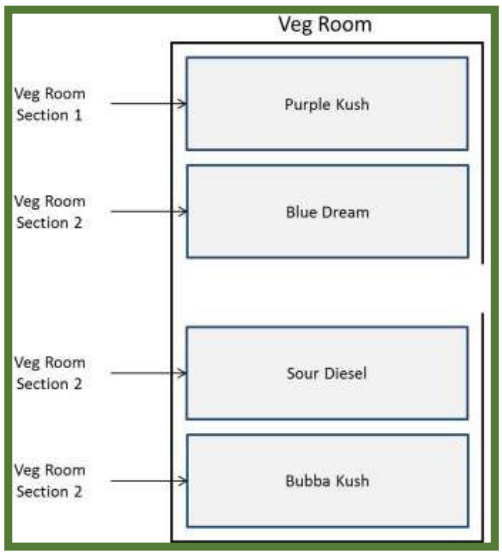

Figure 1

In figure 1, we have a scenario where a single room houses multiple strains of vegging plants.

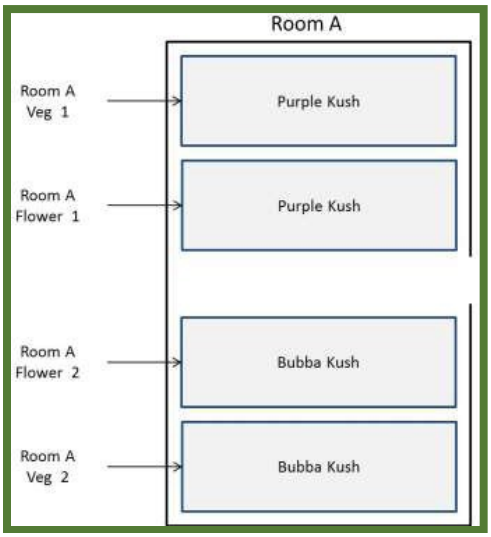

Figure 2

In figure 2, we have two strains in two different phases. In Metrc, we would use the add/edit rooms feature and create the rooms to match. It is permissible in Metrc to create rooms to match a facility's operations.

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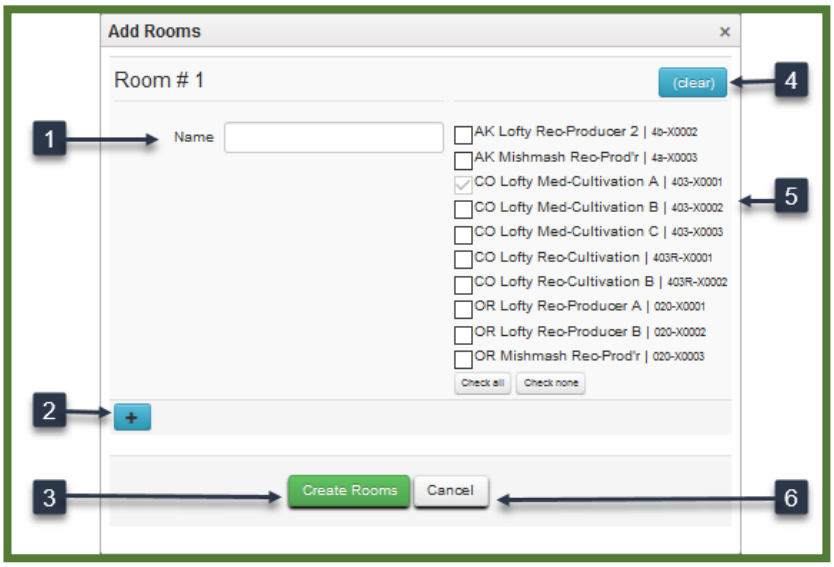
Add Room



Item 1: Name field

Name field will allow you to add a name to the room. This can be any name, location or sub location you choose. For example, "Veg Room Section 1" "Veg Room Section 2" etc.

Item 2: Add button

When creating rooms, you can add multiple rooms at one time.

Item 3: Create Rooms button

Select this button when you are finished and ready to create the room.

Item 4: Clear button

By selecting this button, you will clear the data entered in the "Name" Field

Item 5: Facilities

You can add a room to more than one facility at a time. Here you will select the facilities you want this room added to.

Item 6: Cancel button

Use this button to cancel a new entry before selecting the "Create Rooms" button.

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Edit Rooms

Item 1: Room field

The drop-down menu will allow you to select the room you would like to edit.

Item 2: Name field

Name field is where you can edit the name field associated with the room.

Item 3: Add button

You can edit multiple rooms at a time.

Item 4: Save Rooms

You select the Save Rooms button to save changes and edits. The room information will be updated.

Item 5: Clear button

When you see a clear button, you can clear the room entry and begin again.

Item 6: Cancel button

You may select the cancel button to exit the screen without saving any changes.

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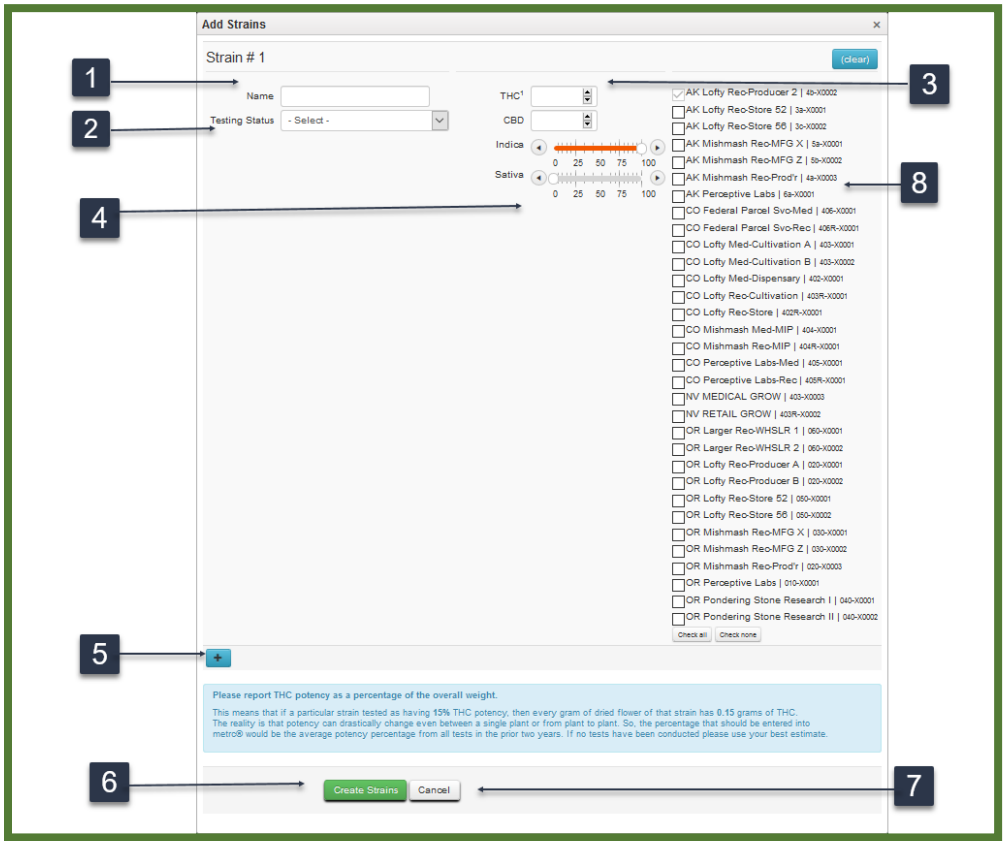
Adding Strains - Breakdown



Item 1: Strain Name

Enter each Strain you grow and/or carry at your facility.

Item 2: Testing Status

An optional field in which you can define whether the product has been tested, and if so, if testing was performed in-house or by a third party.

Item 3: THC and CBD Content

An optional field in which you can identify the THC and CBD content of the Strain.

Item 4: Indica vs. Sativa

An optional field in which you can identify the Indica vs Sativa makeup of the Strain.

Item 5: Add More Strains

Select this button to add multiple strains at once on this screen.

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Item 6: Create Strains button

Select this button to save the information and create the strain(s).

Item 7: Cancel button

Select this button to exit the screen without saving any information.

Item 8: Additional Facilities

If your organization has multiple facilities, you can add strains to one or more at the same time using the relevant checkmark boxes.

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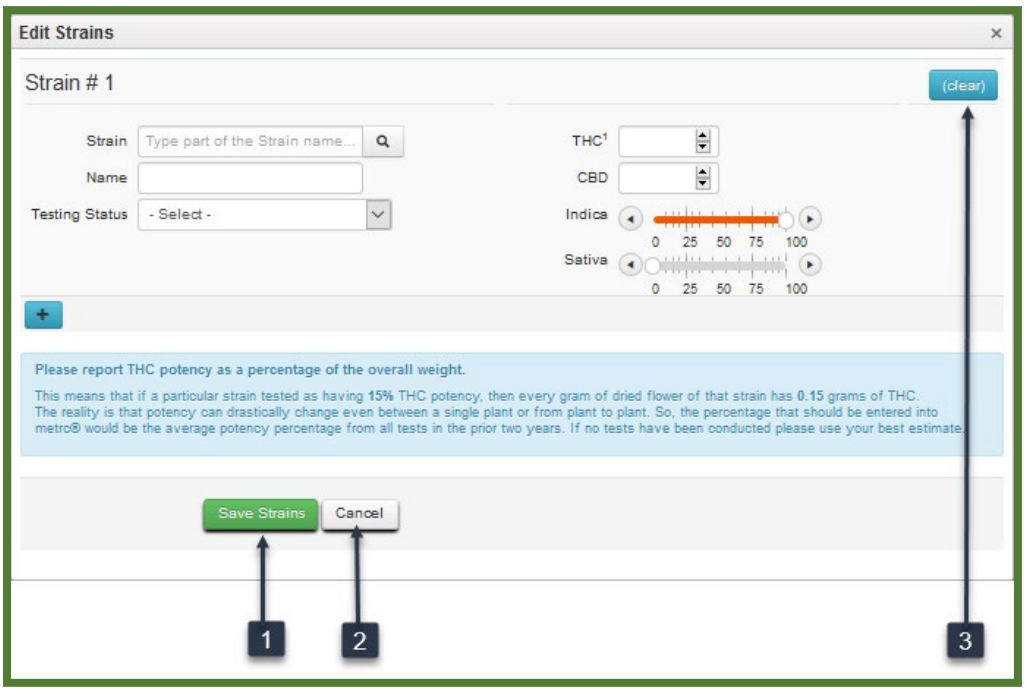
Edit Strains

Metrc allows you to edit a strain that has already been added to your system. If a strain name has changed or been modified or if a strain has new test data, the edit feature can be used to update the information.



Item 1: Save Strains

To save the edited data, click this button.

Item 2: Cancel button

To exit this screen without edits.

Item 3: Clear button

To clear all the fields and begin entering data again select this button.

Adding Items – Keep In Mind

When adding Items into Metrc, please keep in mind:

1. The “Item” name should identify the product that will be packaged and eventually distributed to Patients/Consumers.
2. The Item name should not simply identify the Category; it should describe the specific item that will be packaged from a Harvest or Production Batch.
3. Items must be populated for each individual facility.
4. As you create your Item, you will also identify the Category it belongs to. Categories available in the dropdown menu are populated by the State. Categories facilitate the tracking of product in the system by like groups.
5. The facility packaging the product names the Item; the Item name carries with the product through the distribution chain. It is unlikely that a store would ever change the name of an Item, even if/when repackaging product.
6. Once Items are created in the Items admin area, they will be available in the Items dropdown menu as the facility creates packages.

• Item Categories are defined by the State, refer to your State Supplemental to find the specific categories that have been setup by your State.

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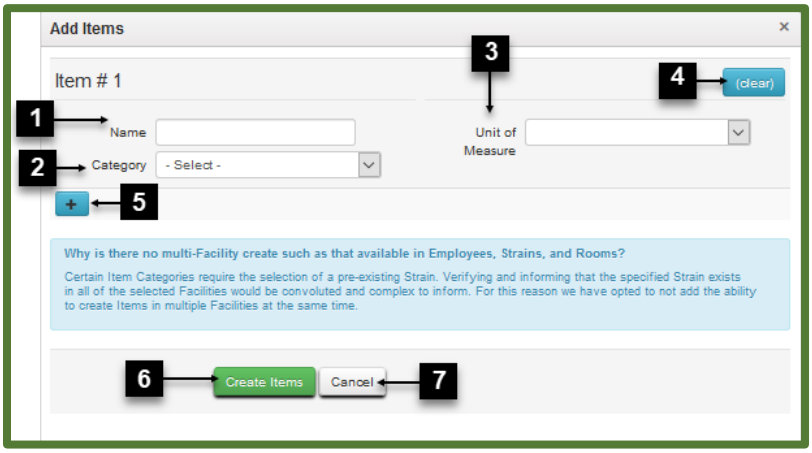
Adding Items



Item 1: Name

Type the Item Name, keeping the naming requirements identified in the Categories discussion on the previous page and under Category below in mind.

Item 2: Category

Select the correct Category for the item from the State-populated dropdown menu, keeping in mind the guidelines reiterated below. Certain category selections may populate more data fields underneath Unit of Measure for you to complete.

Item 3: Unit of Measure

If an Item belongs to a weight-based Category, select the Unit of Measure for that Item. If the Item belongs to a count-based “each” Category, select “Each”. Please ensure you’ve selected the correct unit of measure before creating the item.

Item 4: Clear button

Select this button to clear all entered data.

Item 5: Add button

Select this button to create additional items while on this screen.

Item 6: Create Item button

Select this button to save all entered data a create the item in the system.

Item 7: Cancel button

Select this button to exit the screen without saving any information.

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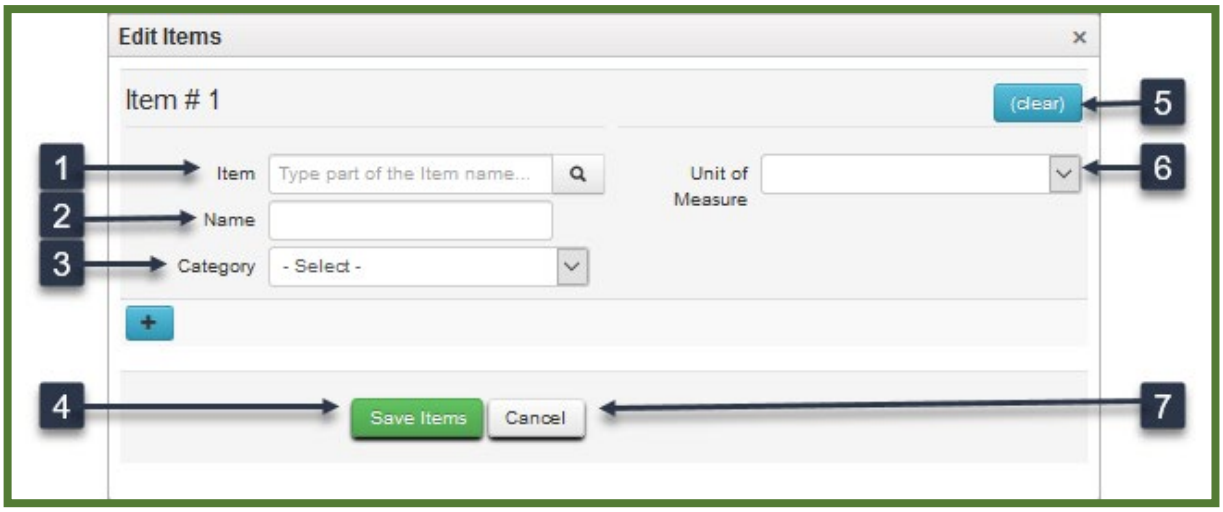
Edit Items



Item 1: Item field

The item field allows a user to change or modify a specific item that has already been created. By using the pull-down menu, the user can select the item they choose to modify. All of the fields can be changed or modified. The user may also select the item in the item list and then select the edit item feature and it will automatically populate the item in the name field.

**If the item you select is a “by strain” category, a strain field will populate as well.

Item 2: Name field

This is where you may edit the items name.

Item 3: Category

You may change the category the item is associated with. You cannot change the category for an item if you have already created packages using that item. You will have to discontinue that item and create a new item with the desired category. Please refer to your State Supplemental for your State's required categories.

Item 4: Save Items

When you have completed the modifications to the item you can save your changes by selecting the save changes button.

Item 5: Clear button

The clear button will remove all entries from each field.

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Item 6: Unit of Measure

This is where you can alter the unit of measure. You may not be able to change the unit of measure if the category you are using has restrictions on the unit of measure.

Item 7: Cancel button

Using the cancel button before selecting the save button will revert the item back to its original state.

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Adding Patients

Please see your state supplemental for patient information.

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Employees

A Medical/Recreational Marijuana Business may designate licensed Owners and employees who hold a valid Occupational License/Handler's Permit as a Metrc user. A Medical/Recreational Marijuana Business shall ensure that all Owners and Occupational Licensees/Handler's Permit Holders who are granted Metrc User account access for the purposes of conducting inventory tracking functions in the system are trained by Metrc Administrators in the proper and lawful use of Metrc.

A Marijuana Business is accountable for all actions employees take while logged into Metrc or otherwise conducting Marijuana Business or Marijuana-Infused Product inventory tracking activities.

Activating an employee in the Metrc system is very similar to the process the Metrc key administrator performed. An employee will be added and will receive a credential just as the Administrator. Each employee will receive an email and a link for their first-time login to Metrc.

The Metrc system provides the following functionality:

- Permissions
- Home
- Welcome Email
- Add an Employee
- Edit an Employee
- Lock an Employee
- Unlock an Employee
- Disable an Employee

When adding an employee, it will be necessary to add permissions that an employee will use to perform tasks in the Metrc system.

A Medical/Recreational Marijuana Business and its designated Metrc Administrators and Metrc user(s) shall enter data into Metrc that fully and transparently accounts for all inventory tracking activities. A Medical/Recreational Marijuana Business is responsible for the accuracy of all information entered into Metrc.

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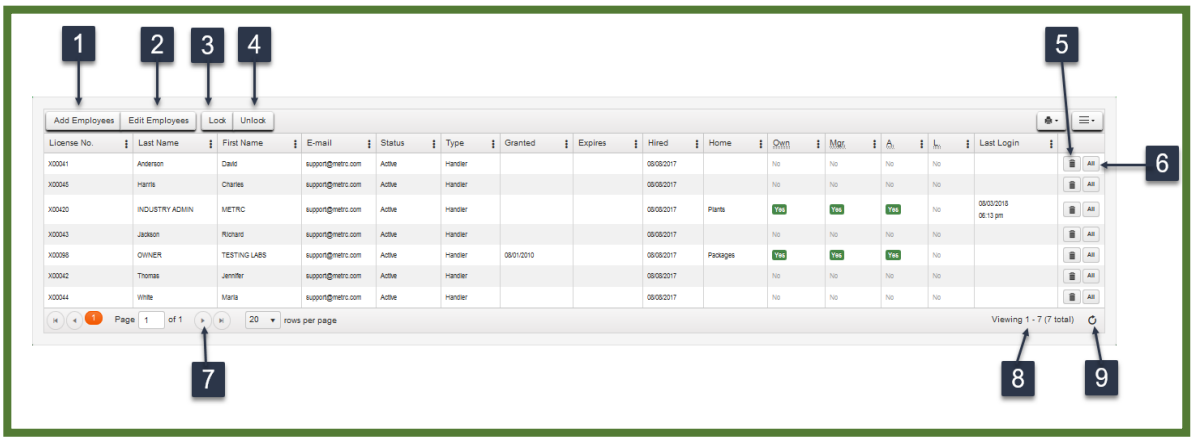
Employees Screen



Item 1: Add Employees button

Add Employees Button is used to add employees with badges/handler's permits as a user to Metrc.

Item 2: Edit Employees button

Edit Employees Button is used to access an employee profile should you need to edit it.

Item 3: Lock button

Lock button is used to temporarily lock an employee's access to login to Metrc. (An owner may not lock another owner in Metrc.)

Item 4: Unlock button

Unlock Button is used to allow access to a previously locked employee.

Item 5: Trash Can button

The trash can button is available to be used when you need to remove an employee from the license. Upon disabling an employee, they will no longer have access to that facility.

Item 6: All button

All Button is available to be used when you need to remove an employee from all facilities they are registered with. Upon disabling an employee, through the all button they will no longer have access to Metrc.

Item 7: Items per Page

This area will increase or decrease the number of item views per page and shows the number of pages needed to show all items.

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Item 8: Items to Display

Items to Display will show you how many total numbers of items that fit your filtered criteria.

Item 9: Refresh button

The Refresh Button will help you refresh your filtered criteria up to the moment.

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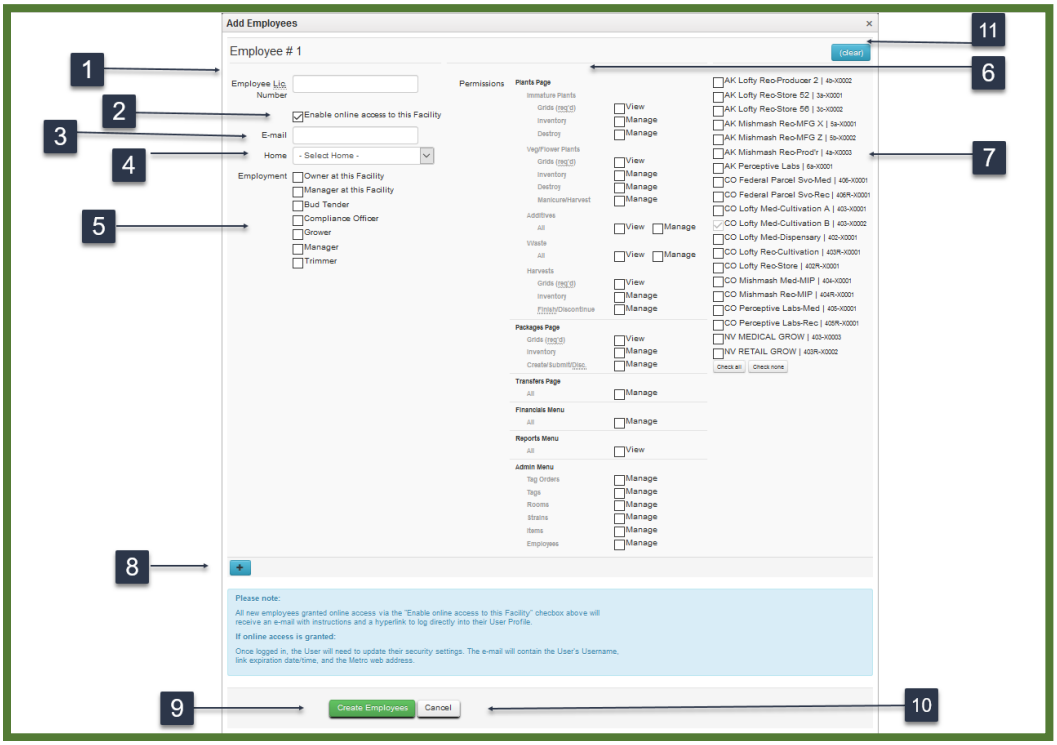
Adding Employees



Item 1: Employee License Number

Enter the employee's State-designated license badge number. The system will associate all actions performed by a user with them. If you selected Unlicensed, should your state allow unlicensed employees, this field will be replaced by the employee's name, date of birth (and last 4 digits of their social security number if applicable).

Item 2: Enable Online Access checkbox

Use this checkbox to designate whether the employee being added will or will not have access to the organization's Metrc account. While all employees must be entered in the Employees list in the software, not all employees have to be given access.

Item 3: Email

Enter the employee's individual email address. This is where the employee's "Welcome to Metrc" email will be sent.

Item 4: Home

Select a "Home" screen for the employee; this will be their default screen in Metrc. The home screen does not affect the employee's ability to move from screen to screen but does need to match the Permissions granted to the employee.

Item 5: Employment

This area may be used to designate the job functions of the individual being added. This designation does not automatically populate certain Permissions; the Administrator will still need to designate Permissions for each specific user.

Item 6: Permissions

Select the checkbox for each function an employee will need to access to complete their job tasks. This area will not be visible if you are adding an employee who will not have access to the system. The options available in this section vary by facility type. Owners are encouraged to be highly selective about which permissions they grant to each employee.

Item 7: Facilities

If an employee is being added, who will have access to multiple facilities for an organization with more than one license, they may be added to those facilities at the same time. Keep in mind, however, that if the same employee needs different permissions at different facilities, the Administrator will need to add or edit that employee in each individual facility.

Item 8: Add button

Allows you to enter multiple employees at the same time.

Item 9: Create & Save Employees button

Click here to save your work and add the employee to the facility.

Item 10: Cancel button

Click here to exit the screen without saving any data.

Item 11: Clear button

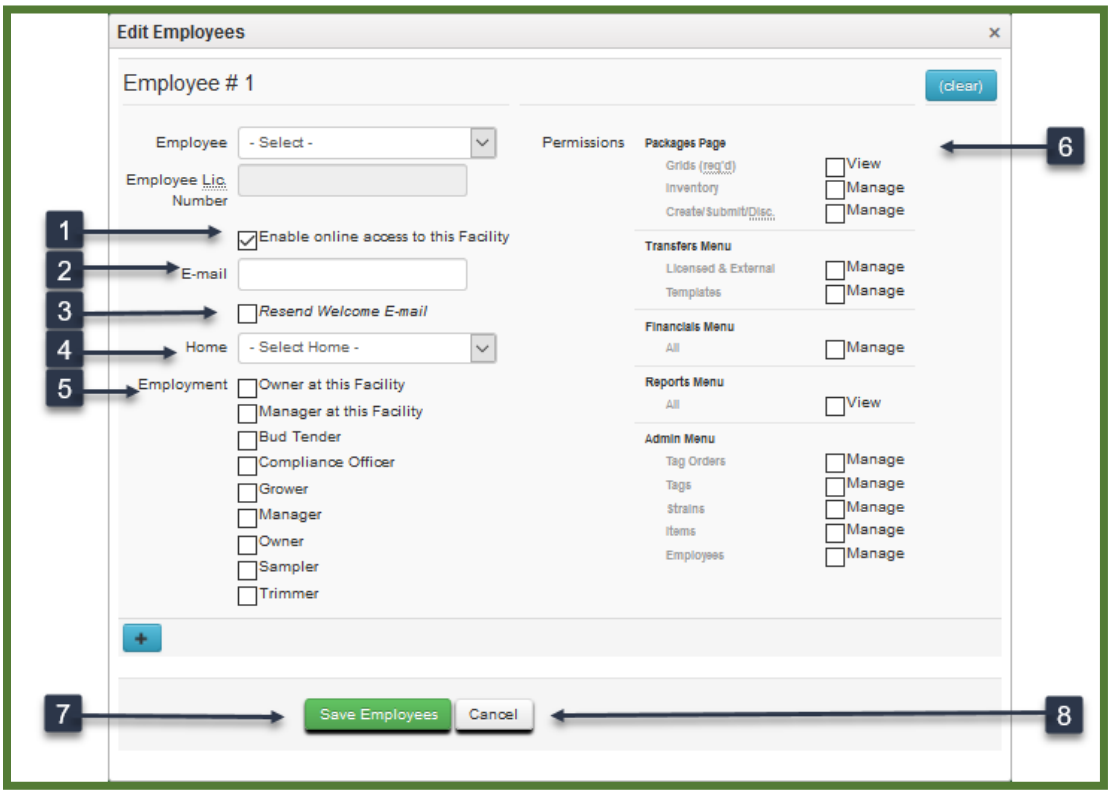
Click here to clear all the information fields.

Notes:

- The Permissions that you select for an employee will affect the functionality available to them on the navigation bar and within each functional area.

- As specified in the First-Time Credentialing section of this guide, the log-in link contained in the “Welcome to Metrc” email expires 24 hours after the link is sent. If an employee fails to log in within the 24-hour period, the Metrc Administrator will need to return to the Employees menu, select that employee, and click the "Resend Welcome Email" box.

Edit Employees



Item 1: Enable Online Access

Enable Online Access will allow you to remove online access or grant online access to an existing employee.

Item 2: Email field

Email field will allow you to edit an employee's email address. If you are enabling access for the first time an email address is a required field.

Item 3: Resend Welcome E-mail

An employee's "welcome to Metrc" credential email is similar to the Admin email, it will expire within 24 hours of the time it was issued. If your employee did not activate or receive their login credentials it will need to be resent. Simply select the "Resend Welcome E-mail" check box and select save employee button. This will resend the "welcome to Metrc" E-mail.

Item 4: Home

Select a "Home" screen selected for the employee; this will be their default screen in Metrc. The home screen does not affect the employee's ability to move from screen to screen but does need to match the Permissions granted to the employee.

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Item 5: Employment field

This area may be used to designate the job functions of the individual being added. This designation does not automatically populate certain Permissions; the Administrator will still need to designate Permissions for each specific user.

Item 6: Permissions

Select the checkbox for each function an employee will need to access to complete their job tasks. This area will not be visible if you are adding an employee who will not have access to the system. The options available in this section vary by facility type.

Item 7: Save Employees button

Click this button to save your work and exit.

Item 8: Cancel button

Click this button to exit without saving.

Remember:

- When updating an employee's email address it will update all of the facilities associated with that employee.
- When the Admin is editing the employee's permissions, the changes will only be reflected in that specific facility.

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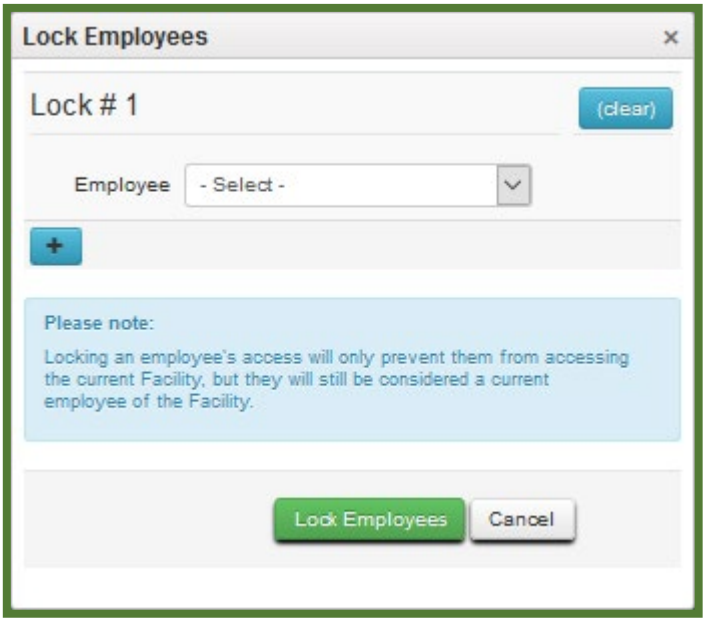
Lock Employee (by Facility)

The Employee lock feature is to allow the Admin to temporarily lock and employee in a facility. Locking an employee will prevent them or someone else from accessing their information and entering data into the Licensees Metrc account. As an example of when an Admin may choose to use the lock feature would be in the case of a leave of absence such as maternity leave or an employee vacation. One owner is not permitted to lock another owner out of Metrc at any time.



Remember:

- This feature as with most in Metrc is by facility. The lock out feature will not lock them from every facility, only the facility the Admin currently has specified. You will have to lock the employee out of each facility.

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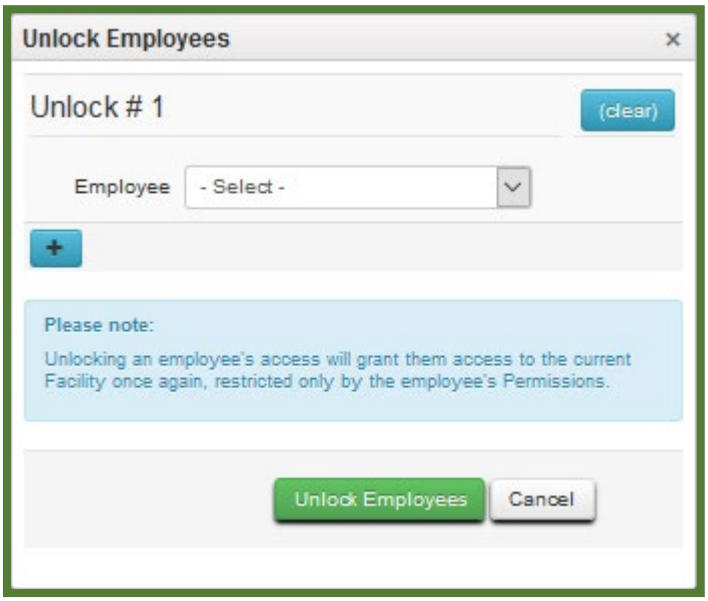
Unlock Employees (by Facility)

The Employee unlock feature allows the Admin to unlock an employee that has been temporarily locked in a facility. Unlocking an employee will restore the employee's ability to perform the functions they were originally granted by the Metrc Admin.



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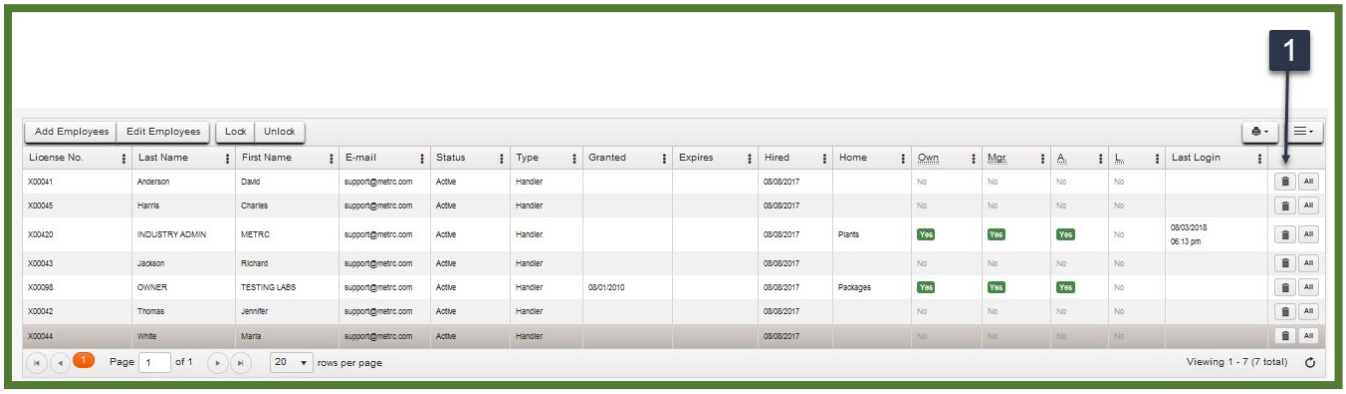
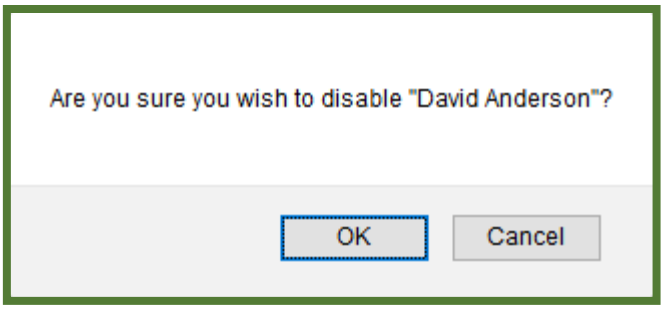
Disable an Employee



Item 1: Disable feature

The Disable feature should only be used when an Administrator wants to permanently remove someone from a facility. The Disable feature will not remove them from every facility, only the facility the Admin currently has specified.



Please Note:

- You will be prompted before Metrc will disable the employee.
- A disabled employee can be added back as a new employee.
- Disabling an employee will not erase the tasks they performed previously in Metrc

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RFID Tags

The requirement for the tagging of plants and packages is derived from the rules and regulations that govern the Marijuana industry. The need for the tag is to provide a unique identification number for each plant and package created in the Metrc system. By providing these unique numbers Metrc creates a chain of custody from the origination of the plants through the to the final sale. Attaching the unique numbers is a common practice in many industries where a chain of custody is required. In fact, many of the features of the Metrc system were developed in the food service and pharmaceutical industries where patient safety and having the ability to perform recalls if necessary are strong considerations. Because the RFID tag has a unique ID number for each plant and package and coupled with Metrc event history, the ability to monitor the movement and contact history of each and every tagged item allows the oversight required for the rules and regulations.

The RFID component

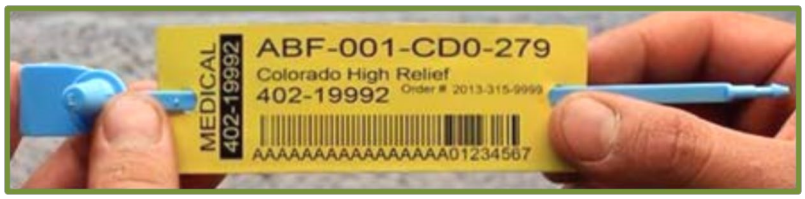
The RFID tags used in the Metrc systems are referred to as a commercial off the shelf (COTS) product. These RFID tags are governed by the EPC (Electronic Product Code) Class 1 Gen. 2 protocol under the ISO18000 part 6. The RFID tags themselves are programmed by Metrc when a customer places an order and specifically assigned to that facility. This is why each facility must place orders individually for that one and one facility only. Tags cannot be moved or reassigned. By following this process, the chain of custody becomes very strong and reduces user error by eliminating the need for a user to enter ID numbers into the Metrc system.

The RFID tag is made up of several components, the RFID chip, the antenna the chip uses to send and receive its unique ID number with the substrate the RFID tag is attached to. This assembly is referred to as a RFID inlay and shown in the figure below.

There are two types of tagged inventory in Metrc; Plants and Packages.

The Plant Tag

The Plant Tag is used to track the plant from the immature phase through to the harvest. A clone or seedling is not tracked due to the high degree of loss normally associated to that particular growth phase. Plants are immature, vegetative, or flowering. All plants must enter the system through immature plant batches.



Medical Plant Tag

Retail Plant Tag

The plant tag has the following information printed on the tag:

- The Application, either Medical (Yellow) or Retail (Blue)
- The facility name
- The Business License number
- The Tag order date
- A UCC 128 bar-code that matches the ID number programmed on the RFID chip and the human readable ID number printed on the front
- The unique 24-digit ID number for the plant

The plant tags have the RFID inlay imbedded in between two layers of UV, water and smudge resistant materials to allow the tag to withstand the environment required for the plant to grow.

The Package Tag

Packages are created for immature plants, harvest batches or other packages. Package tags are RFID based as well. The package tags are standard pressure sensitive labels and also come on Medical (Yellow) and Retail (Blue) versions.

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The package tag has the following information printed on the tag:

- The Application, either Medical (Yellow) or Retail (Blue)
- The facility name
- The Business License number
- The Tag order date
- A UCC 128 bar-code that matches the ID number programmed on the RFID chip and the human readable ID number printed on the front
- The unique 24-digit ID number for the package

Remember:

- Tags are ordered under the Admin tab on the black tool bar for each facility.Plant and Package tags are available (and required) in a Cultivator/Producer.
- Package tags are the only tags used in a Processor, Wholesaler, and Store.
- You will need package tags on ALL product that is transferred out of a facility. Transfers cannot be created without the identification of the package ID number.
- All tags (both plant and package) are loaded in to your Metrc account and packaged when shipped in numeric order. The labels will be delivered in corresponding order to how they show in your account.
- It is recommended that you verify that the tag you are using on a plant or package corresponds with the one you are using in Metrc.

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Plant Tag & Attachment

The plant tag was created specifically for use with the Marijuana plant. The material composition is designed for a wet high UV environment. The plant tags come in sequential order and are placed into the shipping box in a fan folded format that matches the order they will be received in your Metrc account. Tags are perforated and have die cut holes to place the tag attachment device through.

Step 1 – Remove the circular chads on one side of the Plant Tag

Step 2 – Place the Strap through the hole on that side

Step 3 – Place the Strap with the tag dangling around the Plant (see Strap Instructions below).

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Plant Tag Strap Instructions

Figure 1

Figure 2

Figure 3

Figure 1: Push the tail end of the strap through the lock until you hear a click and the plastic knot passes through the lock, securing the strap for first use.

Figure 2: If you need to reposition the strap and tag, push the strap through the lock until there is enough space to clip beneath the first knot. Avoid pressing the second knot through the lock.

Figure 3: Cut the strap as shown in the picture above, releasing the strap.

Figure 4

Figure 5

Figure 4: When you are ready to secure the strap again, as with the first usage, push the tail-end through the lock until you hear a click and see the knot on the other side of the lock.

Figure 5: To release the strap from the last lock, you must cut the strap.

You can repeat steps 2-4 to reuse the strap twice more, for a total of four strap placements.

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Attaching a Tag to a Plant

A Plant must be tagged once it has reached your state's designated height tall or wide at its tallest or widest point. When a plant is not large enough to carry a strap and tag, they can be affixed around the stem of the Plant, as seen in the picture on the left below. The tag should be visible. Once the plant is large enough to carry the tag and strap, they should be repositioned higher on the plant so that the tag is hanging vertically and is visible, as seen in the pictures in the middle and on the right below.

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Package Tags

A package is defined as any amount of marijuana or marijuana infused products that may be sold, processed or transferred and must be placed into one or more containers, each container having its own unique RFID tag. This includes but is not limited to all bud, shake and infused products and or concentrates. Any product you intend to transfer must have a package tag.

The Package Tag is perforated with the upper and lower information being the same.

The Package tag breaks into 2 pieces:

- The larger portion stays with the original package or container.
- The lower portion can be attached to another device such as a container at retail or on intake paperwork at a Processing, Testing, or Center/Sore facilities.

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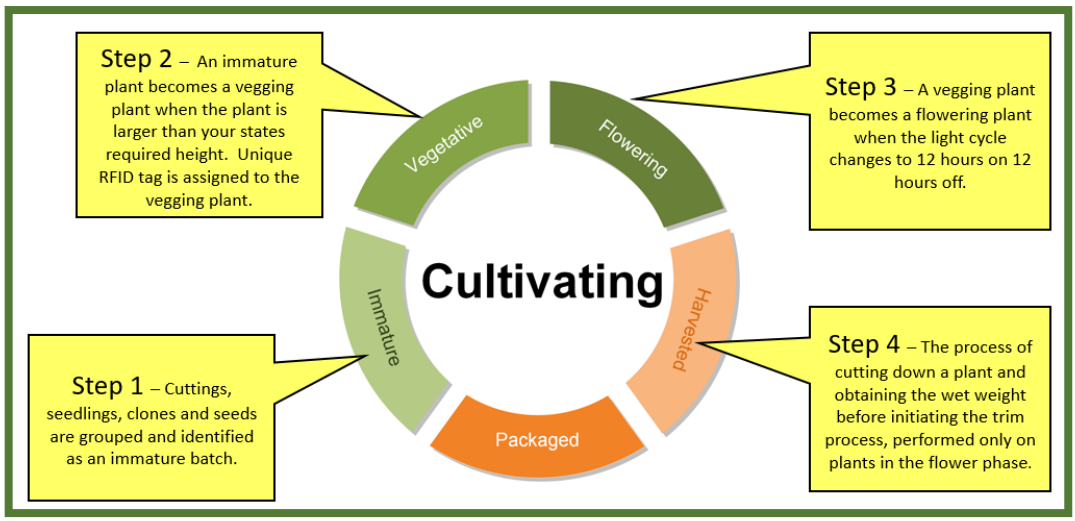
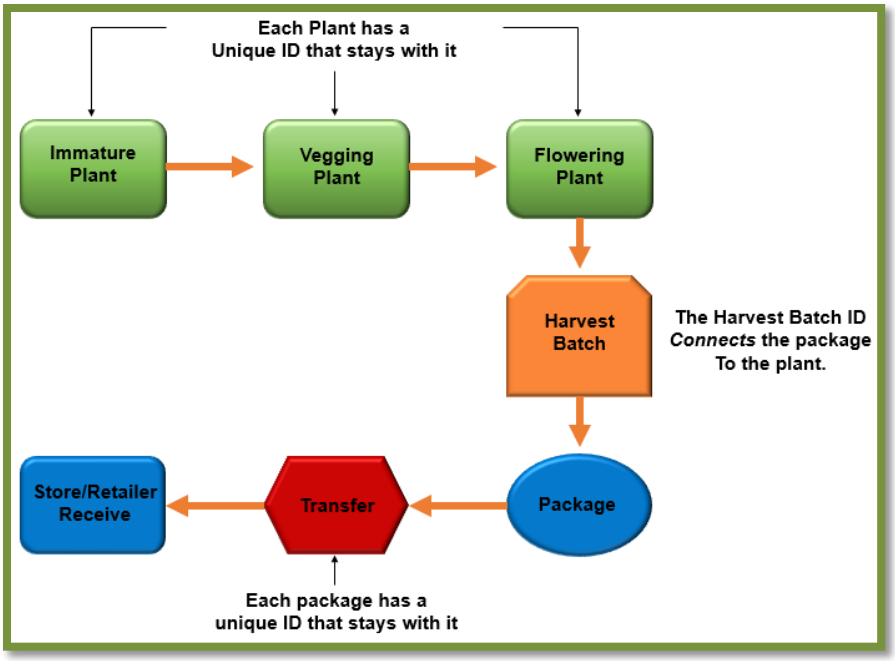
Plants

This Metrc process was developed with the State and businesses within the industry. The following image was created to graphically depict the growth cycle from seed or clone through the harvesting process. The image shows the scope of the Metrc system and how Metrc interacts with the industry. While there are many variations in the way individual companies grow and harvest, this process captures the most common stages and functions used by the vast majority of the industry. The graphic is used to help the users of the manual to understand the plant steps in this chapter.



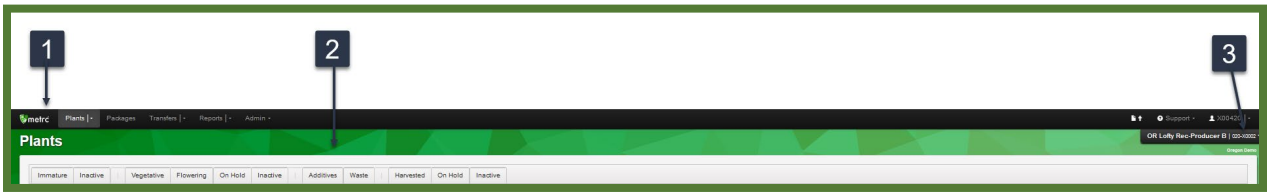
The Metrc system is a reporting system with a chain of custody. This chain of custody begins with the seedlings or clones. The two key terms people need to keep in mind are “reporting” and “chain”. From the immature plant all the way to the final transfer received at the store, you should always be able to track a product from one ID number to another. If you cannot see a connection from one point to another, the chain is broken, and the process is incorrect. Please see the graphic below.



The only place where a Metrc tag does not represent a point in the process is at the Cultivator/Producer in the Harvest batch. The harvest batch does not have a tag but still has an ID. The harvest batch ID, as you will see is assigned by the Cultivator/Producer or Metrc will assign it automatically. The harvest batch ID connects the plant ID number to the package tag ID number. In this way, we have connected all of the points of the chain together and can track from one point to the next. Because of this chain, Metrc allows the person(s) handling the plant, batch or package to “report” on the movement of the product from one stage to the next.

Navigating in Plants

Navigating in the Plants section is similar to navigating the other sections of Metrc, but the plant section has multiple phases each with features that are both common and unique to that particular phase. It is important to note that the plants section of Metrc has been setup to follow all of the applicable rules and regulations and also trying to minimize data entry.



Item 1: Navigation Tool Bar

The Navigation Tool Bar will show you the Plants option. Plants will only be accessible from a grow/producer License type.

Item 2: Phase Tabs

The Plants Tabs will provide you with the tabs to access the functions required to handle plant and plant movement by phase. The Immature tab will provide the functions necessary to create seedlings and clones while the remaining tabs will handle the specified phases.

Item 3: Facility Identifier

Shows you the facility you are currently working in.

Remember

- ALL packages from a Harvest Batch are created from the Harvested Tab.
- Always verify you are performing functions in the facility you intend to.

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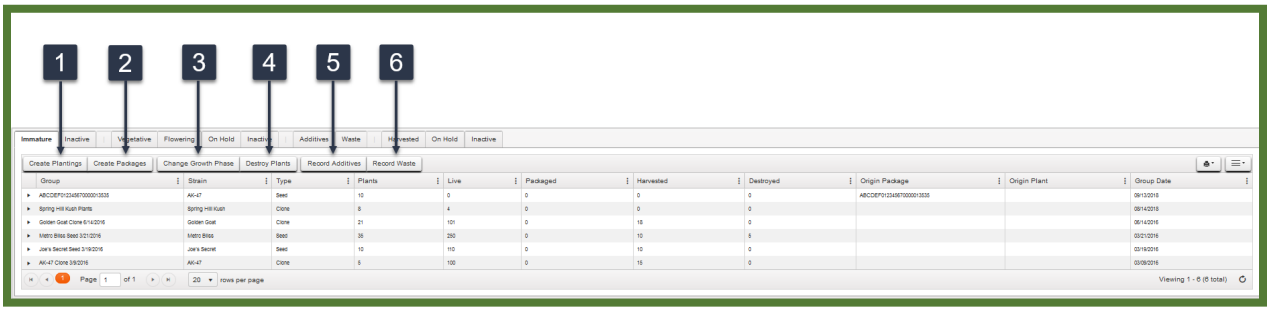
Immature Plants

The Immature Plants phase is the first phase of the growth cycle captured in the Metrc system. Cuttings, seedlings, clones or seeds are grouped and identified as an immature batch and are strain specific. An immature plant becomes a vegging plant when the plant is larger than your state's required height (tall or wide). A unique RFID tag is assigned to the vegging plant.



Item 1: Create Plantings

The Create Plantings button under the Immature tab will create plantings from thin air. Entering plants from thin air is not compliant unless you have state permission to do so, or it is included in creating your beginning inventory. Please see your Beginning Inventory guide located under the Support tab in Metrc regarding this information.

Item 2: Create Packages

The Create Packages button is for when you are creating a package of immature plants or seeds to transfer to another facility. All packages of Immature Plants are strain specific.

Item 3: Change Growth Phase

Changing Growth Phase button is used when an Immature Plant(s) is/are ready to be moved from the Immature Phase to the Vegetative Phase of growth. This can be done individually or as a group.

Item 4: Destroy Plants

Destroy Plants button is used when an Immature Plant(s) ceases to be a viable plant and needs to be destroyed in Metrc.

Item 5: Record Additives

Record Additives can be used to record any additives applied to an immature group of plants.

Item 6: Record Waste

Record Waste can be used to record waste found in an immature group of plants.

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Create Plantings - Immature

The first step in the cultivation and harvest process begins with the seed or clones from which the plants are created. Seedling or clone plants are prone to a high degree of loss during this particular phase of the growth cycle. Because of the large number of failures of these plants, it was determined placing the RFID tags on plants during this phase was not a suitable option. It was determined that creating a batch of plants at this phase would prove to be the most suitable answer. Please note that The Create Plantings button under the Immature tab will create plantings from thin air. Entering plants from thin air is not compliant unless you have state permission to do so, or it is included in creating your beginning inventory. Please see your Beginning Inventory guide located under the Support tab in Metrc regarding this information.

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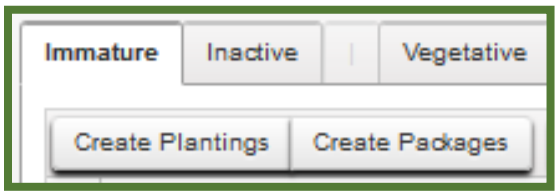
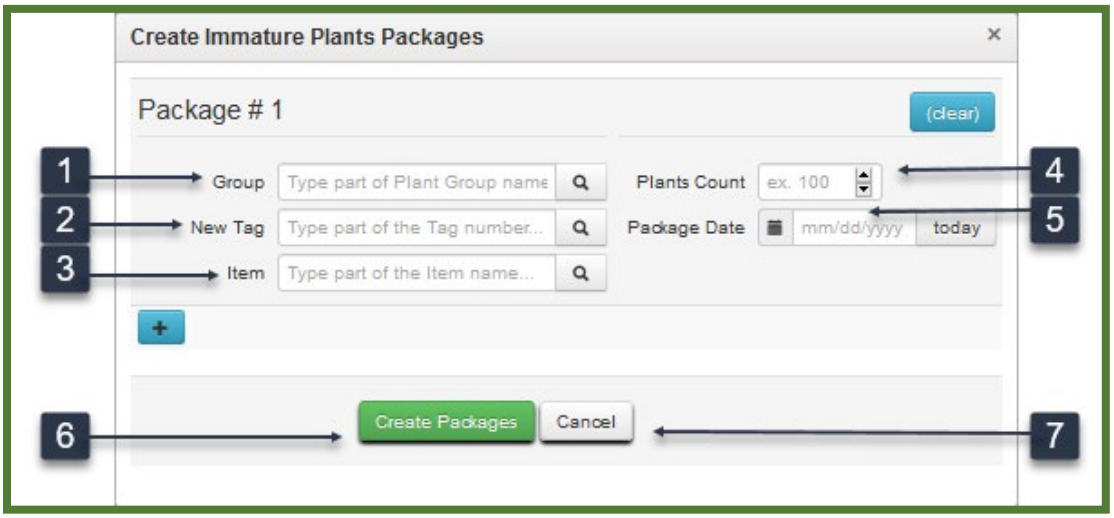
Plant Packages - Immature

Immature plants can be transferred from a Cultivator/Grow. Keep in mind that in Metrc it is not permissible to move Flowering plants to another facility for selling purposes. Please see the State rules and regulations of what type of plant may be transferred. In order to move any products that will be sold, it must be moved as a package. To do this, a package must be created in Metrc. You will create a package for the immature plant by navigating to the plants section, choosing the immature tab, and selecting the Create Packages button.



Once you have chosen the create package button, the following form will appear.



Item 1: Group Name

This is the name of the immature group that you are selecting to package plants from.

Item 2: New Tag

This is the package tag number that you are assigning to the package of plants.

Item 3: Item Name

This is the item name assigned to the package of plants.

Item 4: Plants Count

This is the number of plants you are pulling from the immature group to package up.

Item 5: Package Date

Select the package date. You can enter the information manually or select the today button which will choose the date to which your computer is currently set.

Item 6: Create Packages

Click this button to Create Packages and save your work before you exit.

Item 7: Cancel button

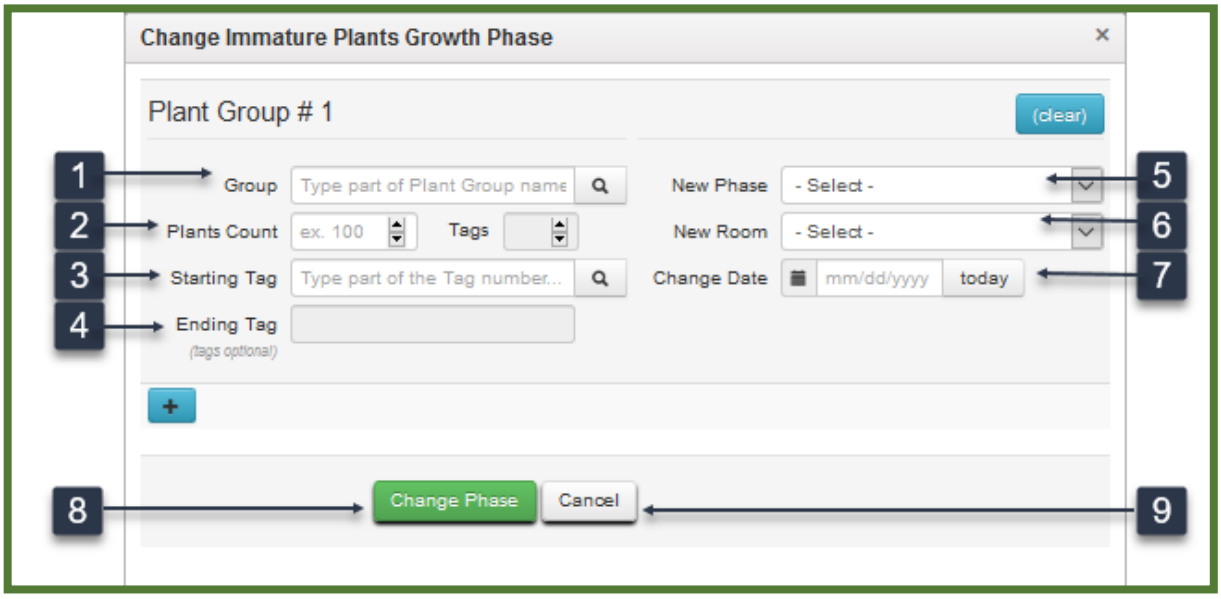
Click this button to exit the window without saving your work.

Remember:

- You can select multiple plants for shipping with one package tag a long as they are all the same strain.
- Shipping immature plants is strain specific for each package.
- Creating a package will automatically adjust the plant count for that batch.

Change Growth Phase - Immature

Changing the growth phase on the Immature tab is where RFID tags are assigned to the plants. At this stage, the batch name will go away, and the plants will now have a unique ID number. Once the ID number is assigned, the plant will now have a unique ID number just as a vehicle has a VIN number. The unique ID number is an important step in securing the chain of custody. Using the change immature plant growth phase feature allows the assigning of many tags at one time.



Item 1: Group Name

Select the immature group that you wish to change the growth phase. You may click on the magnifying glass to see the list of groups available.

Item 2: Plants Count

Enter the number of plants that you are moving from the immature group to the new growth phase. By entering this number, Metrc will assign ID numbers for those plants. The amount of tags will be removed from the available tag inventory. If there are not enough tags, only the available tags will be shown.

Item 3: Starting Tag

This is where you will select the starting tag for the plants, most likely the next tag number in the drop-down menu.

Item 4: Ending Tag

The ending tag will auto-populate based on your plants count and your starting tag.

Item 5: New Phase

Select the new growth phase for the plants.

Item 6: New Room

If you move the plants to a new room, select the new room here. You can change the growth phase without changing the room. If the room will not change, just select the same room.

Item 7: Change Date

This is the date of the change.

Item 8: Change Phase

When all of the information has been entered and verified, select the Change Growth Phase button to complete the change.

Item 9: Cancel

Select this button to close out of the window without saving your work.

Remember:

- It is not a requirement to move all the plants from the clone or seedling to vegetative phase.
- Plants grow at different rates and Metrc does not require the plants to move all at one time.
- Changing phase does not require a room change, the plants may stay in the same room or they may change rooms. This is up to the facility and how they currently manage their plants growth cycle.
- If you do not have enough Tag ID numbers available, Metrc will show the available number of Tags in the tag count field.

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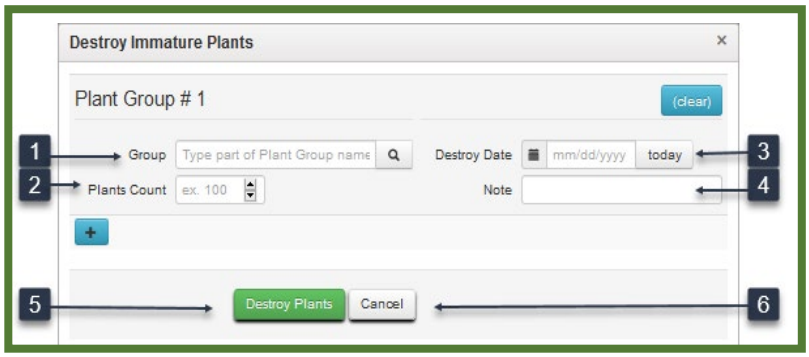
Destroy Plants - Immature

Plants are subject to failure at each stage of the growth cycle. Plants at the clone stage moving to immature are more prone to failure than at any other time. The following form provides the user with a way to destroy plants that have not survived.



Item 1: Group Name

You will choose the immature plants group that the destroyed plants are coming from.

Item 2: Plants Count

Enter the number of plants that need to be destroyed from the selected group.

Item 3: Destroy Date

Enter the date the plants will be destroyed.

Item 4: Notes Section

The notes section will allow you to make notes as to why a plant or group was destroyed.

Item 5: Destroy Plants

Once all the information has been entered and verified, select the green Destroy Plants button to complete the action.

Item 6: Cancel

Use the Cancel button to close out of the window without saving any work.

Remember:

- Make sure you are destroying the correct plant, once a plant is destroyed it cannot be brought back.
- You should always verify your plant count against the rules to make sure a facility is in compliance with the regulations.
- The destroy plants feature can be used as needed. It is not limited to one time.

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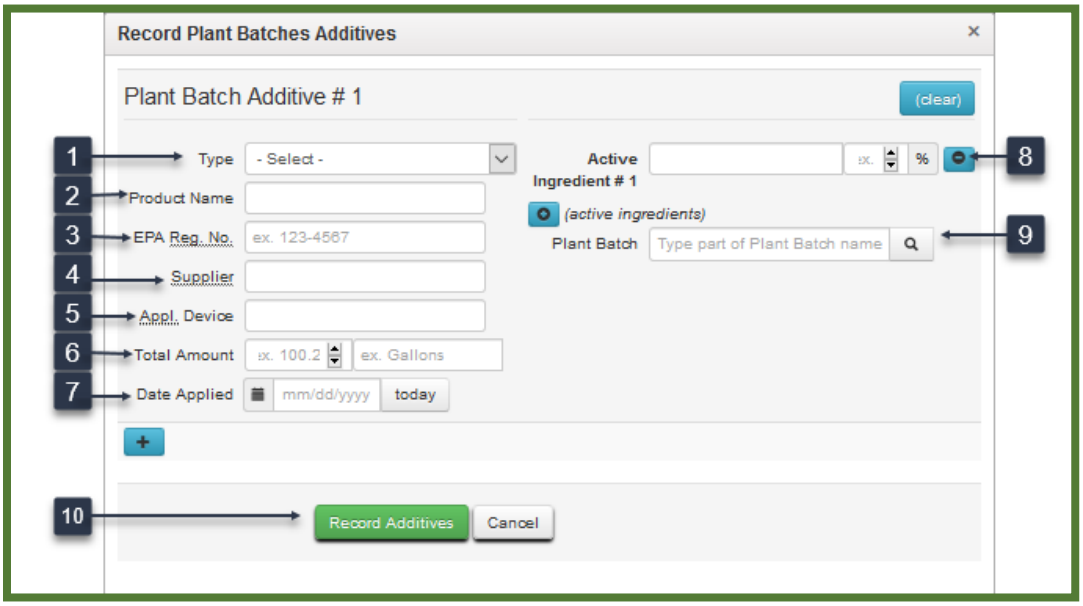
Record Additives - Immature

This area in Metrc is where additives like fertilizer, pesticides and other additives are recorded by plant. Additives may be recorded by room in the Additives Tab. Please see the State's rules and regulations as to whether additives are required to be entered into Metrc.



Item 1: Type

Select the type of additive being applied from the dropdown menu.

Item 2: Product Name

Enter the Product Name from the label.

Item 3: EPA Regulation Number

Enter the EPA Regulation Number if applicable.

Item 4: Supplier

Enter the additive Supplier name.

Item 5: Application Device

Enter the type of device being used to deliver the additive.

Item 6: Total Amount

Enter the Total Amount of additive being applied.

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Item 7: Date Applied

Enter the date of application.

Item 8: Active Ingredient #1

Enter the first Active Ingredient from the additive label. You may use the blue addition button under and just to the left of this item to add additional active ingredients.

Item 9: Plant Batch

Enter the name of the Plant Batch to which the product is being applied. The blue addition button under and just to the left of this item may be used to identify additional Plant Batches to which the product is being applied.

Item 10: Record Additives button

Select Record Additives to save the information and exit the screen.

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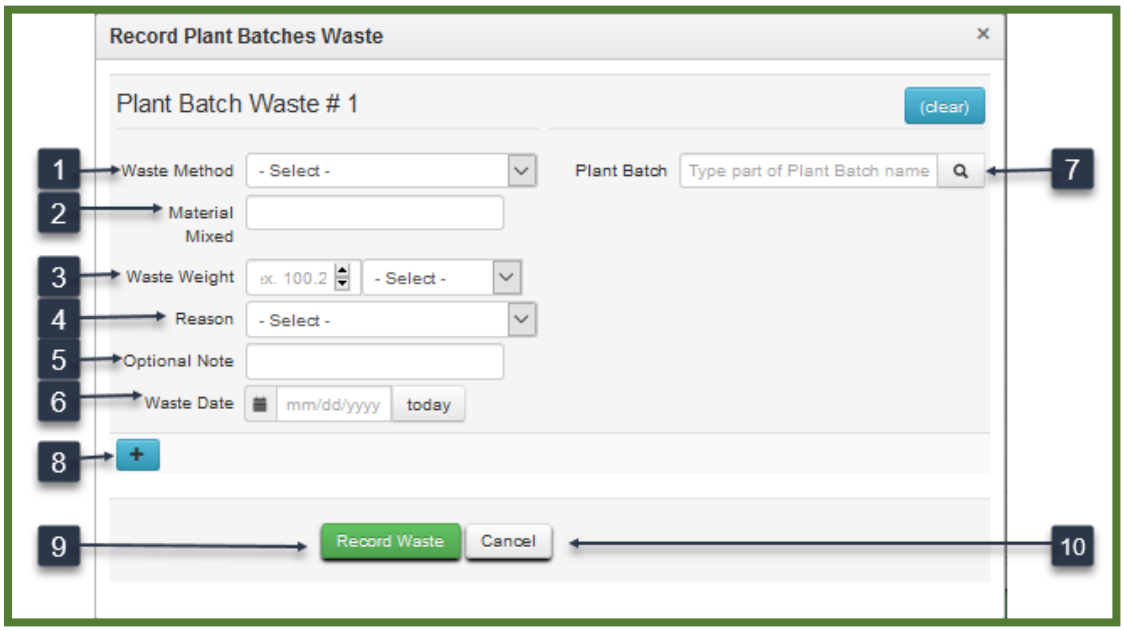
Record Waste - Immature

This area in Metrc is where waste can be recorded from live plants. Waste may be recorded by room in the Waste Tab. Please see the State's rules and regulations as to whether waste is required to be entered into Metrc.



Item 1: Waste Method

Select the waste method from the dropdown menu.

Item 2: Material Mixed

Identify the material with which the waste was mixed to dispose of the product in accordance with regulations.

Item 3: Waste Weight

Input the total weight of the product being wasted and select the Unit of Measure from the dropdown menu.

Item 4: Reason

Select the most appropriate reason why the product is being disposed of from the dropdown menu.

Item 5: Optional Note

You may choose to use this area to provide additional information about why you are disposing of the product.

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Item 6: Waste Date

Enter the date when you disposed of the material.

Item 7: Room

Enter the Room from which the waste came. If you were entering waste by Immature Batch, this would be the Batch information. If you were entering waste by Plant or groups of two or more plants, this would be the Plant(s) information.

Item 8: Add button

You may use the add button to record more than one waste entry at a time from this screen.

Item 9: Record Waste button

Select Record Waste to save the information and exit the screen.

Item 10: Cancel button

Select the Cancel button exit the screen without saving any information.

Item 11: Clear button

Select the Clear button to clear all entered data.

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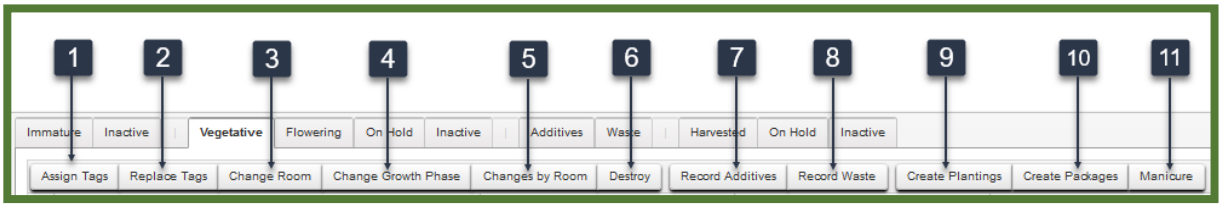
Vegetative Plants

The vegetative state is the second part of the growth cycle captured in the Metrc system. A vegging plant becomes a flowering plant when the light cycle changes to 12 hours on 12 hours off.



The Vegetative Plants phase in Metrc is captured with the following functions:

Item 1: Assign Tags

Assign Tags button is used to assign a Plant Tag number to a plant that did not get one assigned to it previously.

Item 2: Replace Tags

Replace Tag button is used to replace a Damaged or Destroyed RFID tag. This is not a very common practice since the RFID tags are created to be very durable.

Item 3: Change Room

The Change Room button is used when you are moving plants from one room to another.

Item 4: Change Growth Phase

The Change Growth Phase button is used to change the growth phase (and the room if necessary) of a plant during the growth process.

Item 5: Changes by Room

Changes by Room button is used to make changes to all of the plants in an entire room at one time.

Item 6: Destroy

Destroy Plants button is used to destroy a plant when the plant is no longer viable.

Item 7: Record Additives

Record Additives button is where you will record the additives used on plants or rooms of plants. Additives would include fertilizer, pesticide or other.

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Item 8: Record Waste

Record Waste button is where you will record the waste taken from live Vegetative plants.

Item 9: Create Plantings

Create Plantings button will allow you to create a planting of a clone or a seed from a vegetative plant.

Item 10: Create Packages

Create Packages button will allow you to package up a Vegetative plant.

Item 11: Manicure

Manicure Plants button is used to create a manicure batch when trimming from Vegetative plants in anticipation of selling or processing the product being trimmed off of the plant. If product is being trimmed off of a vegetative plant in anticipation of wasting it, that does not get reported in Metrc; it gets reported in the waste log that is located at the Cultivator/Grow.

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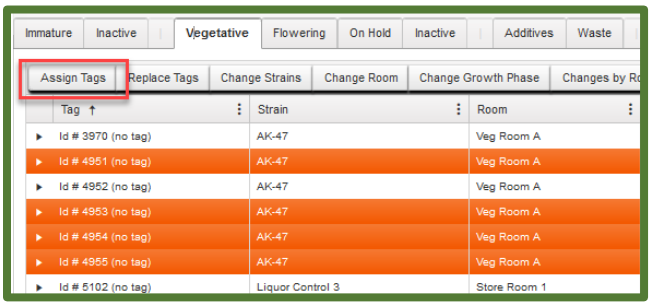
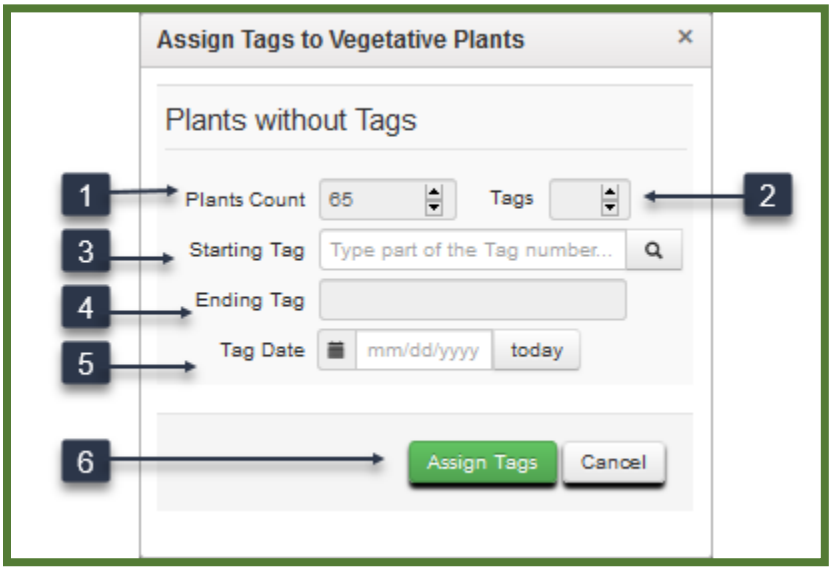
Assign Tags - Vegetative

It is possible, although not recommended, to move plants into Metrc without having tags assigned to them. In this case, tags can be assigned in the Veg phase. The first step in assigning tags is to locate the plants that have not had tags assigned to them. To locate the plants, you can sort all of the plants in the ID field by ascending or descending order by clicking on the column header or choosing the filter option, and the plants with no tag numbers will appear first.

You can select 1 plant at a time or select multiple plants by using the control or shift keys and select with your mouse. By choosing the assign tags button, the assign tags form below will appear.





Item 1: Plants Count

The exact amount of tags required is auto populated to match all the unassigned tags. You cannot just assign some of the tags. The system will only let you assign all the tags at the same time providing you have enough tag numbers available.

Item 2: Tags Count

This automatically will count the number of tags you will need and have been selected on the started and ending tag fields. This auto calculates for you.

Item 3: Starting Tag

Enter the ID of the first tag you wish to use.

Item 4: Ending Tag

The ending tag ID number will auto-populate in sequential numeric order, depending on the plants count field entry.

Item 5: Tag Date

Select today's date or enter the date manually.

Item 6: Assign Tags

Click the assign tags button to save your entries and exit the screen.

Additional notes:

- If you want to assign a specific plant tag number to your vegetative plant, you can do so by searching the tag number and then choosing ‘Select’. Keep in mind if that tag has been used in Metrc, you cannot assign it to any other plant.

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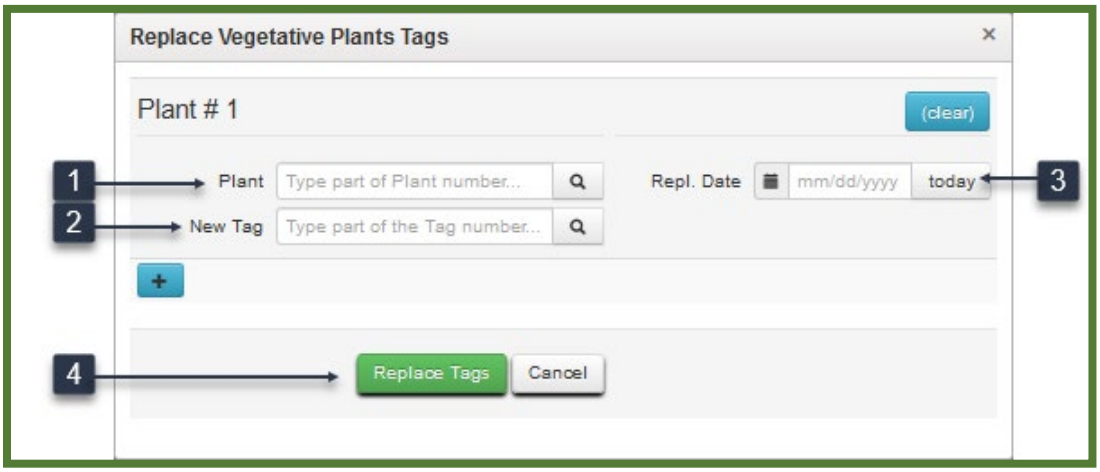
Replace Plants Tag - Vegetative

In the event that an ID tag has become lost or misplaced, a tag can be replaced providing a new ID number for that plant. The following form needs to be completed.



Item 1: Plant

Select the Plant tag ID number from the drop down, for the plant tag you wish to replace (original ID).

Item 2: New Tag

Select the new tag number that you want to replace the original tag number with.

Item 3: Replace Date

Enter the date you are replacing the plant tag with a new tag.

Item 4: Replace Tags

Click this button to save the entries and assign the new plant tag number to the plant. Therefore, the old plant ID number is no longer valid.

Remember:

- Replacing a tag should be a rare event
- When you replace a tag that tag will no longer be shown in your system.

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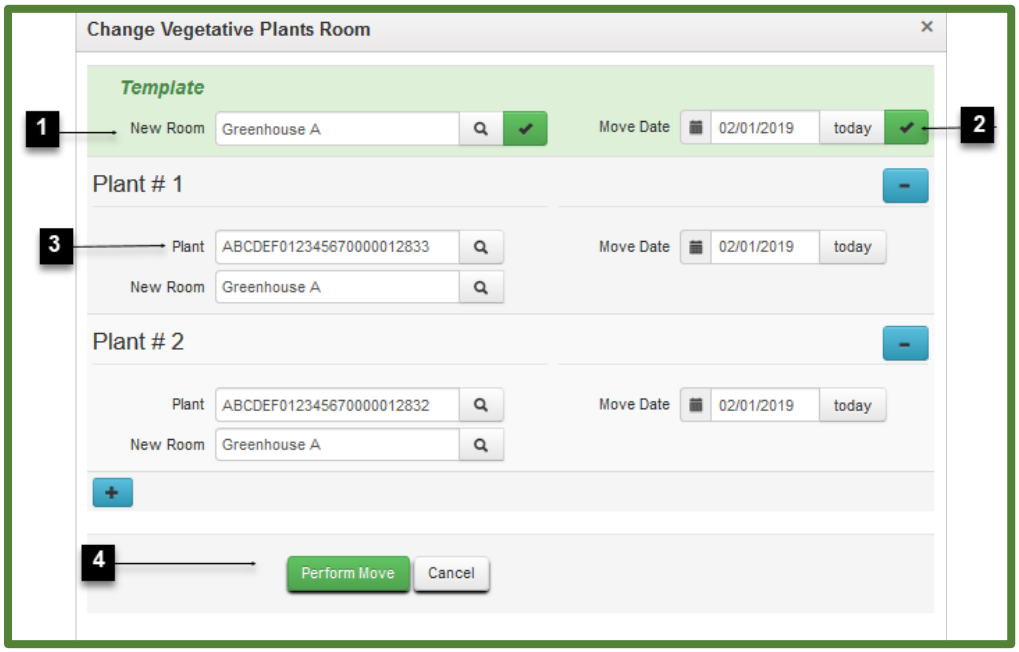
Change Room - Vegetative

The change room feature allows you to move plants from one room to another. Plants can be moved one at a time or in multiples.

To select multiple plants, you can use the Control (Cmd button on a Mac) or Shift buttons on your computer in conjunction with your mouse to highlight all of the plants you would like to move. Simply hold down the control key (Cmd key on Mac) and select the individual plants or hold down the shift key and select the beginning and ending plant and your left mouse key to choose the plants you would like to move. The highlighted plants will be shown in orange.

When you select multiple plants, the change room form will add multiple fields. Metrc will allow you to apply single attributes to multiple plants. In the change room area, the New Room and Move Date can be selected one time and applied to all of the plants in the list. See picture below.

Green template check buttons are available in multiple places throughout the software to save you time. Using them, you can populate the New Room and Move Date by completing the template section and checking the green check mark. That will populate for all the plants you chose to change rooms. You can also change each one individually by choosing the room and date on each plant ID.



This example shows two plants being moved, you may however choose as many plants as you like.

Item 1: New Room

New Room is used to select the new room for the plant(s). Use the drop down to select available rooms (locations) to move the plant(s) to. After selecting the new room, select the apply button to add the new room to all plants in the list.

Item 2: Move Date

Enter the date the plants were/are being moved. After selecting the new date, select the apply button to add the date to all plants in the list.

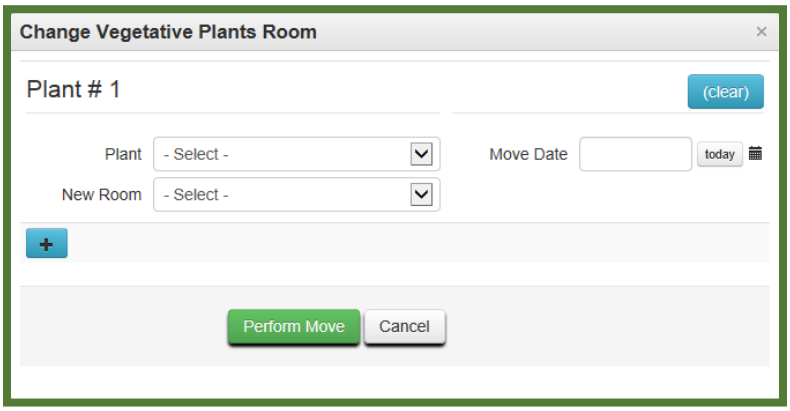
Item 3: Plant ID

The plant ID number will be populated in sequential order from the orange highlighted list the user initially selected.

Item 4: Perform Move

Click this button to save your entry and move the plant(s).

If you choose to select a single plant, you can simply select the Change Room Button on the far-right end of the page. When you select the change room button, the following form will open.



Complete the information for all of the plants in the form just as you would have for a multiple move shown in the first example.

Remember:

- In order to use the template for multiple plants, you must highlight them in orange in the plants screen before selecting the change room button.
- You can still add or remove plants to the list by using the Blue Add (+) or Minus (-) buttons.
- You can still move plants back to the original phase if you have made an error.
- Changing large numbers of plants may still be faster with the change by room feature.

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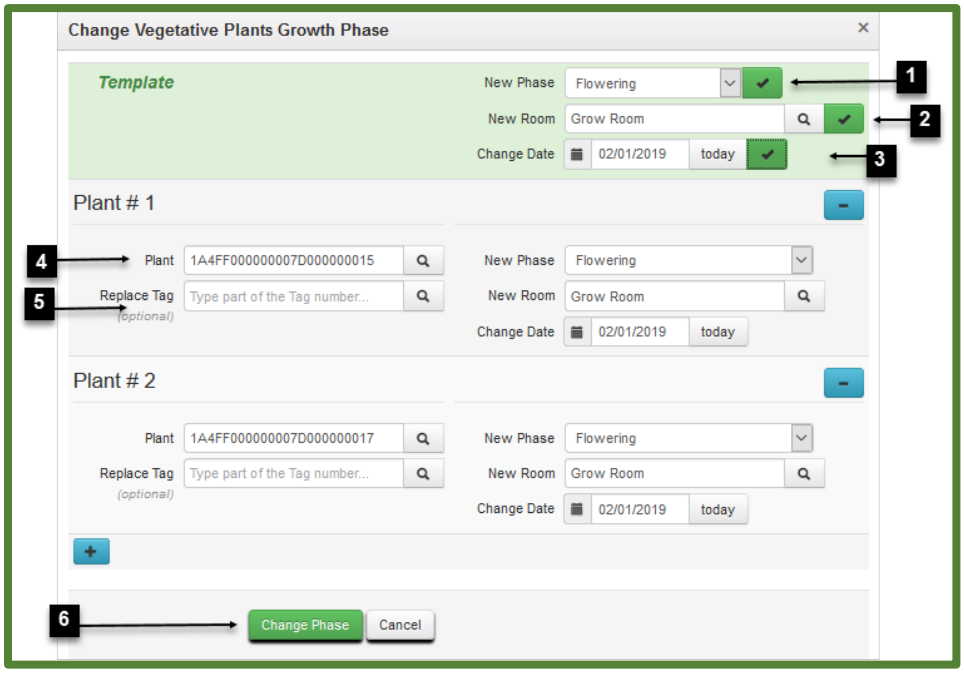
Change Growth Phase - Vegetative

The Change Growth Phase feature allows you to change the Growth phase of plants from one phase to another. Plants can be changed one at a time or in multiples.

To select multiple plants, you can use the control or shift buttons on your computer in conjunction with your mouse to highlight all of the plants you would like to move. Simply hold down the control key and select the individual plants or hold down the shift key and select the beginning and ending plant while using the left mouse key. This will select the plants you would like to move.

After highlighting the plants, use your mouse to select the change growth phase button and the Change Growth Phase form below will open.

Green template check buttons are available to change growth phases as well. By using this feature you can populate the new phase, new room and change date by completing the template section and checking the green check mark on each selection. This action will populate for all the changes on all of the plant ID's chosen. You can also change each one individually by choosing the growth phase, room and date on each plant ID.



This example shows two plants being moved, you may, however, choose as many plants as you need.

Item 1: New Phase

Select the phase the plant is moving to. After selecting the new phase, select the green template checkmark button to add the new phase to all plants in the list.

Item 2: New Room

Select the room the plant will be moving to in its new phase. After selecting the new room, select the green checkmark button to add the new room to all plants in the list. This is optional, if the plants are not moving rooms or if the plants are moving to different rooms you can choose the same room.

Item 3: Change Date

Enter the date that the plant(s) changed to the new Growth Phase. After selecting the date, select the green checkmark button to add the date to all plants in the list.

Item 4: Plant ID

The plant ID number will be populated in sequential order from the orange highlighted list the user initially selected.

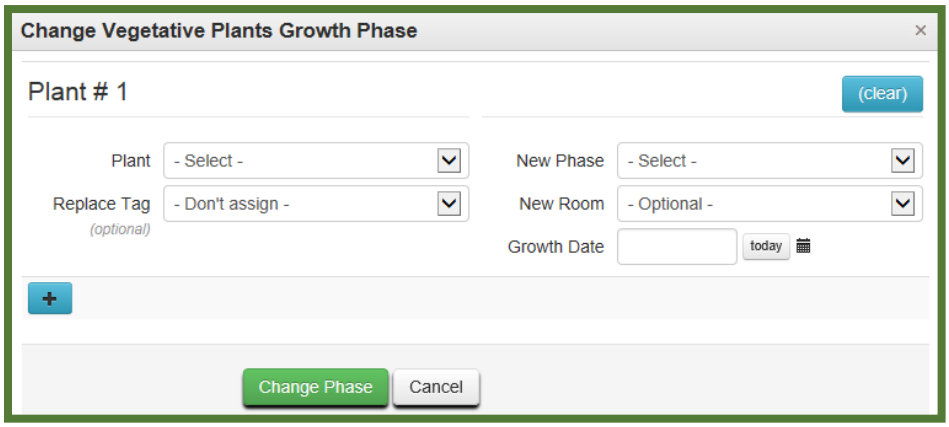
Item 5: Replace Tag (optional)

The plant tag can be replaced at this phase if the tag was lost or misplaced during the change or move process.

Item 6: Change Phase

Click this button to save your entries and selections, to change the phase of the plant(s).

When you select the Change Growth Phase button, the following form will open.



Complete the information for all of the plants in the form just as you would have for multiple plants shown in the beginning example above.

Remember:

- In order to use the template for multiple plants, you must click on the plants you want to change by using your mouse and your Control or Shift keys to highlight them in orange in the plants screen before selecting the change room button.
- You can still add or remove plants to the list by using the Blue Add (+) or Minus (-) buttons.
- You can still move plants back to the original phase if you have made an error.

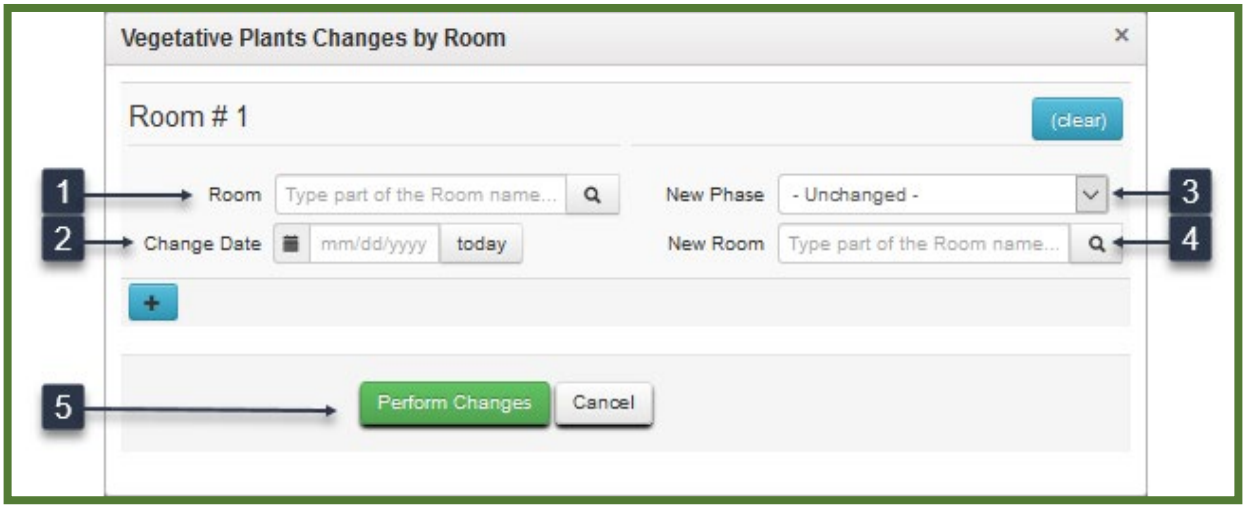
- Changing large numbers of plants may still be faster with the change by room feature.

Changes by Room - Vegetative

The most efficient way to move a large number of plants is to use the Changes by Room feature. The Changes by Room feature allows a user to change large numbers of plants by room or by phase without having to enter individual plant information. This will require the user to utilize the Changes by Room button in conjunction with a Room. To use this function to its maximum capability, it may require the user to add or modify the Rooms they have already created.

In many facilities, a room may have multiple groups of plants. It is acceptable in Metrc to sub divide a room into multiple sections to match what is being grown in that room. For example: Veg. Room Section 1, Veg. Room Section 2, Veg. Room Section 3 etc.

By utilizing this style of room layout, a user may use the Change by Room feature to move large groups of plants simultaneously without having to input information for each plant.



Keep in mind that the room can stay the same while only changing the phase of the sections of plants in that room. After the rooms have been mapped out accordingly, it is a simple task to perform the new room or new phase function. Simply launch the form in the changes by room feature and select the perform change function.

Item 1: Room

You will select the room containing the plants you want to move.

Item 2: Change Date

Select the date you made the changes to the plants in the room.

Item 3: New Phase

The New Phase menu will allow you to choose the phase the room or section will be changing to without having to enter individual plant information.

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Item 4: New Room

The New Room menu will allow you to choose the room or section the plants will be changing to without having to enter individual plant information.

Item 5: Perform Changes button

Select the Perform Changes button to save your data and execute the change.

Remember:

- You can move plants using the shift or control buttons (see moving plants for more details).
- Rooms can be added or changed as the need arises, there is no limit on how many rooms you have, the names or how often they are changed or edited.
- A bar-code scanner may be useful in moving small numbers of plants to ensure the correct plant ID is being selected.

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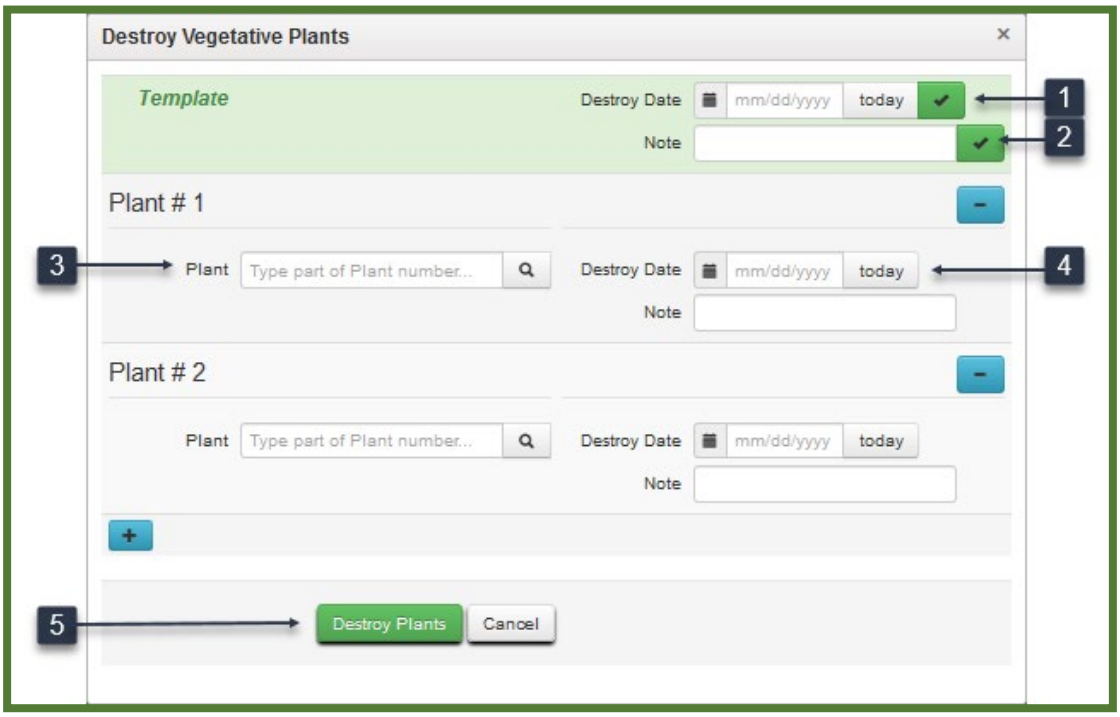
Destroy Plants - Vegetative

Plants are subject to failure at each stage of the growth cycle. The following form provides the user with a way to destroy plants that have not survived.



Item 1: Destroy Date

Metrc will allow you to apply the date to multiple plants. Enter the date into the Destroy Date field either manually or select today and Metrc will enter the date on your computer. After the date is entered, select the green checkmark button and the date will be applied to all of the selected plants.

Item 2: Notes

Metrc will allow you to apply the note to multiple plants. Enter the note into the field and then select the green checkmark button and the note will be applied to all of the selected plants.

Item 3: Plant ID

The plant ID number shows the plant that will be destroyed.

Item 4: Destroy Date

If you choose not to use the green apply function shown in item 1, you can enter the dates for the plants manually or select the today button.

Item 5: Destroy Plants

Once all of the information has been entered and verified, select the green Destroy Plants button which will execute the transaction.

Remember:

- Make sure you are destroying the correct plant, once a plant is destroyed it cannot be brought back.
- You should always verify your plant count against the rules to make sure a facility is in compliance with the regulations.
- The destroy plants feature can be used as many times as required. The destroy plants feature is not limited to one time.

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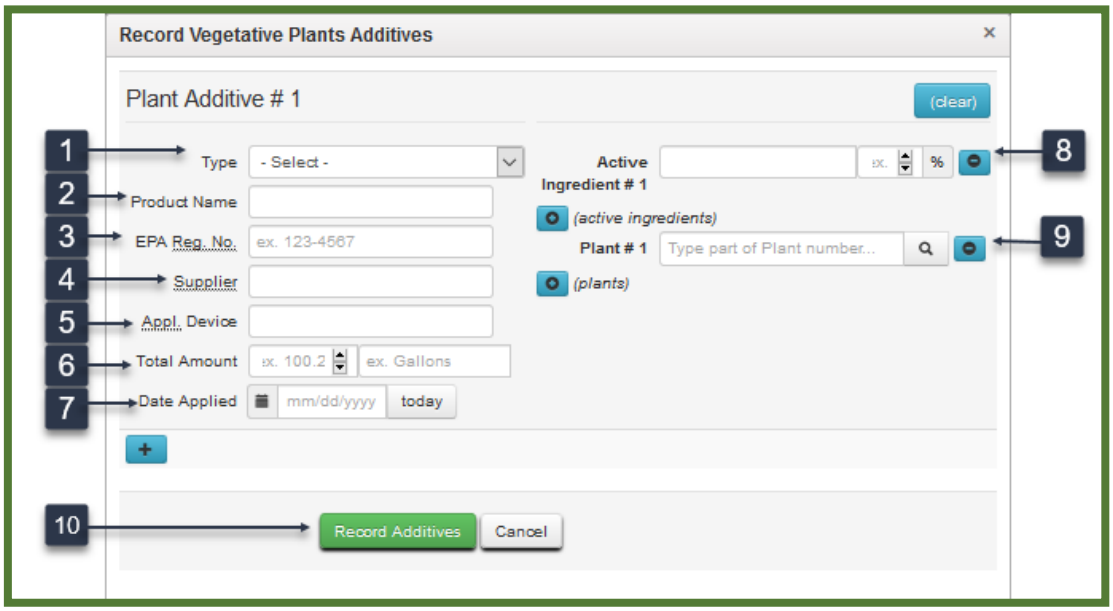
Record Additives - Vegetative

This area in Metrc is where additives like fertilizer, pesticides and other additives are recorded by plant. Additives may be recorded by room in the Additives Tab. Please see the State's rules and regulations as to whether additives are required to be entered into Metrc.



Item 1: Type

Type is a drop-down menu that will allow you to select the type of additive used on the plant. Fertilizer, Pesticide and other are available to use.

Item 2: Product Name

Product Name Field is where the name of the product used on the plant will be entered.

Item 3: EPA Regulation Number

This is where the EPA regulation number of the additive will be entered.

Item 4: Supplier

Supplier is where the additive was purchased. (Wholesale distributor, Warehouse, CO-OP, etc.)

Item 5: Application Device

Application Device is used to describe the type of Application Device that was used to distribute the Additive on the plants (spray bottle, fine mist, nozzle, measured scoop, etc.)

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Item 6: Total Amount

Total Amount is used to describe the total amount of the Additive that was used.

Item 7: Date Applied

Date Applied is used to show exactly what date that the Additive was used on the plant.

Item 8: Active Ingredient

Active Ingredient identifies the active ingredient in the additive. Multiple active ingredients can be added. This is the active ingredient listed on the product being applied and the concentration percentage. Active Ingredients will be stored once they are entered so that active ingredient will show on the dropdown list when logging future additives. The plus sign will allow you to add more active ingredients.

Item 9: Plant #1

The Plant Field identifies the plant or plants that the additive is being applied to. The plus sign will allow you to add more plants to the list.

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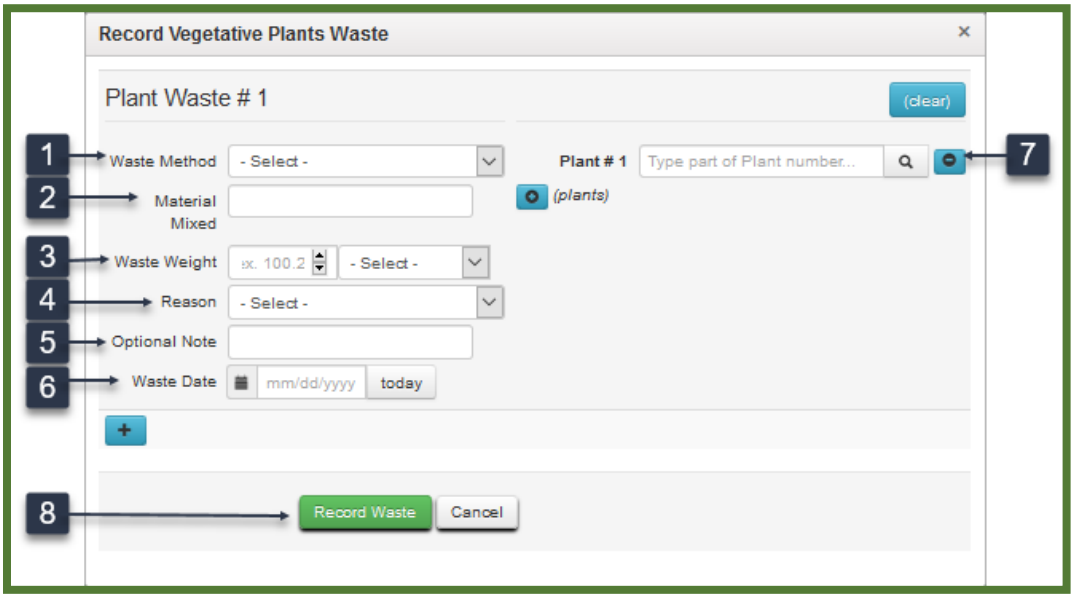
Record Waste - Vegetative



Item 1: Waste Method

Select the waste method from the dropdown menu.

Item 2: Material Mixed

Identify the material with which the waste was mixed to dispose of the product in accordance with regulations.

Item 3: Waste Weight

Input the total weight of the product being wasted and select the Unit of Measure from the dropdown menu.

Item 4: Reason

Select the most appropriate reason why the product is being disposed of from the dropdown menu.

Item 5: Optional Note

You may choose to use this area to provide additional information about why you are disposing of the product.

Item 6: Waste Date

Enter the date when you disposed of the material.

Item 7: Plant Field

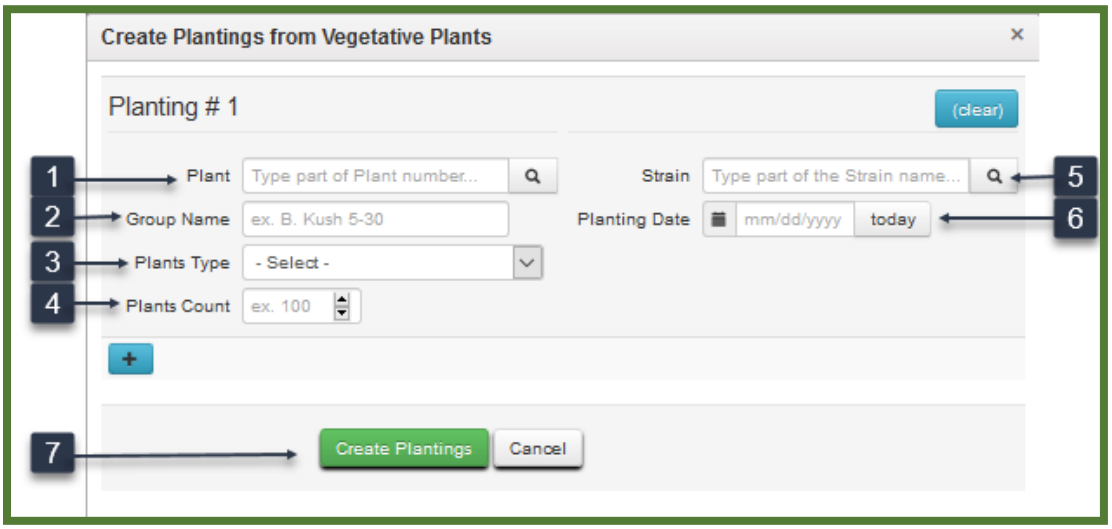
Enter the Plant tag number from which the waste came.

Item 8: Record Waste button

Select Record Waste to save the information and exit the screen.

Create Plantings - Vegetative

Create Plantings is where cuttings or seeds can be created from a plant in Metrc.



Item 1: Plant Field

Plant Field is where the plant tag ID will be entered that the cutting or seed is coming from. You may use the magnifying glass to see the list of plants available.

Item 2: Group Name

Group Name will auto-populate with the plant tag ID however it is able to be edited into a Group Name that is needed, if you do not wish to use the plant tag ID.

Item 3: Plants Type

Plant type is where clone or seed will need to be selected.

Item 4: Plants Count

Plant Count is where you will explain how many cuttings or seeds were taken from the plant.

Item 5: Strain

Strain Field is where you will specify the strain of the cutting or seeds that were taken from the plant. You may use the magnifying glass to see the available strains to choose from.

Item 6: Planting Date

Planting date is the date the cutting or seed was taken from the plant. You may use the today button to display today's date.

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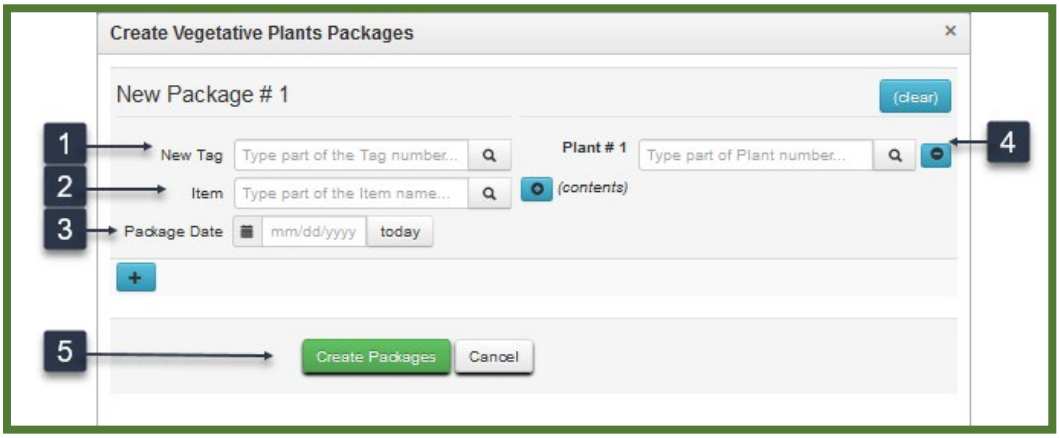
Item 7: Create Plantings

Clicking the create plantings button will create the new batch for the cuttings or seeds taken from the plant.

Create Packages – Vegetative



Item 1: New Tag

Choose the Package tag number that will be assigned to this package.

Item 2: Item Name

Choose the Item name for the package.

Item 3: Package Date

Enter the date that the plant is being packaged.

Item 4: Plant #1

Enter the plant ID number that is being packaged.

Item 5: Create Packages

Select to create the package of the plant(s).

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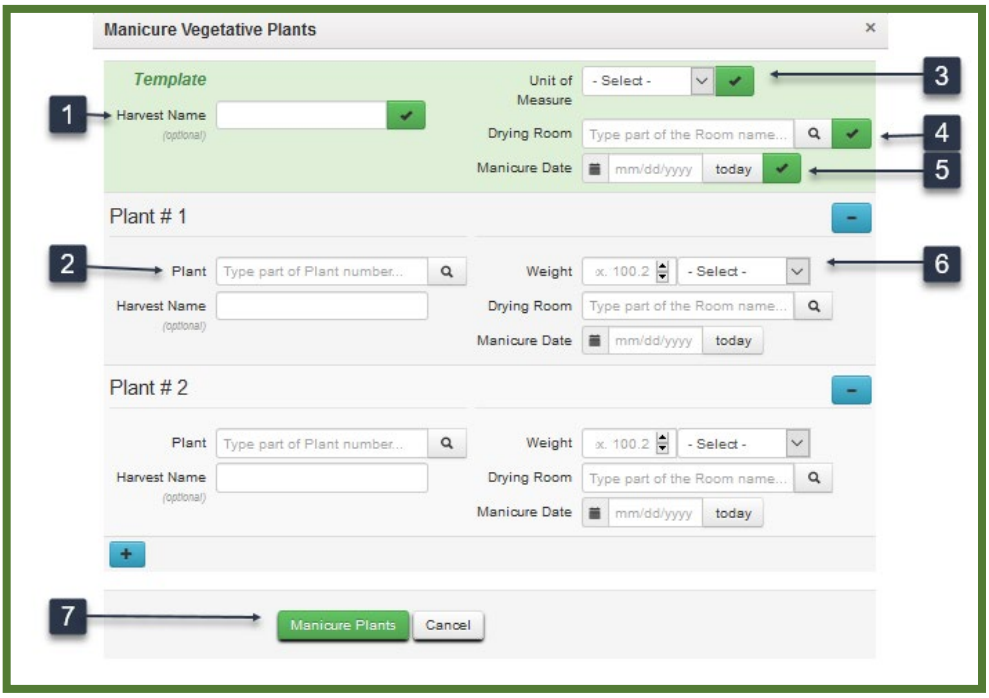
Manicure Plants - Vegetative

The Manicure plant process is designed for a business that may remove parts of a plant before harvest with the intention of selling or processing what was removed. To be clear, this is before the primary harvest. The manicure process could also be used if a usable or sellable part of the plant was broken off prior to harvest. The manicure plants feature is not used for waste reporting when all that is being trimmed off of the plant is waste. That waste gets reported into the Cultivator/Grow waste log located at the facility. Manicuring a plant can be done for single or multiple plants.

To Manicure Multiple Plants, select the plants by using the control or shift buttons on your computer in conjunction with your mouse to highlight all of the plants you would like to Manicure. Simply hold down the control or the shift key and the left button on your mouse to select desired plants.

After highlighting the plants, use your mouse to select the Manicure Plants button and the Manicure Plants form below will open.



This example shows two plants in a Manicure Harvest, you may however choose as many plants as needed.

Item 1: Harvest Name:

> You may name your Manicure batch by any name, or the system will assign one for you. All Manicure batches are required to have a name. After entering the Manicure Name, select the green checkmark to add the name to all plants in the list. It is suggested that you use the strain name and manicure date in the Manicure batch name.

Item 2: Plant ID

The plant ID number will be populated in sequential order from the orange highlighted list the user initially selected.

Item 3: Unit of Measure

Enter the unit of measure from the drop-down list. After selecting the Unit of Measure select the green checkmark to add the Unit of Measure to all plants in the list.

Item 4: Drying Room

Select the room where the Manicure Harvest is taking place. After selecting the room, select the green checkmark to add the location to all plants in the list.

Item 5: Manicure Date

Select the date of the Manicure Harvest. After selecting the date select the green checkmark to add date to all plants in the list.

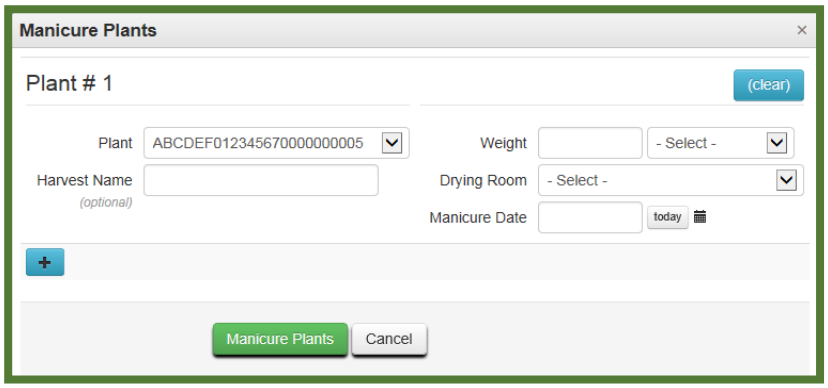
Item 6: Manicure Weight

Enter the weight of the manicure removed from the "pre-harvest" plant. You will have to add the weight for each individual plant in the list.

Item 7: Manicure Plants

Select the Manicure Plants button to create the Manicure Batch and save entries and exit.

When you select the Manicure Plants button the following form will open.



Complete the information for all of the plants in the form just as you would have for a multiple Manicure Plants harvest shown in the beginning example above.

Remember

- In order to use the template for multiple plants you must click on the plants you want to change by using your mouse and your Control or Shift keys to highlight them in orange in

the plants screen before selecting the Manicure Plants button.

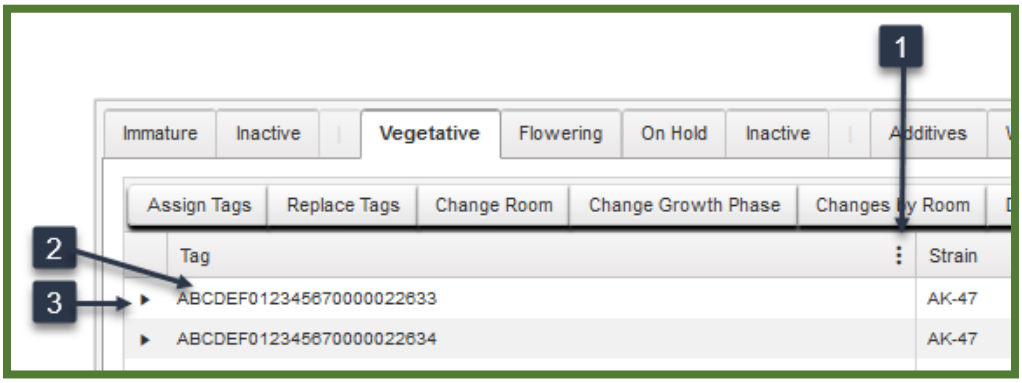
- It is not required to use all of the apply features, you may choose to use only in certain areas. For instance, a user may choose only the harvest name and date but not the unit of measure or room.
- When you choose the apply button it will add that information to every plant in the list, so make sure you have chosen only the plants you wish to manicure.
- You can still add or remove plants to the list by using the Blue Add (+) or Minus (-) buttons.
- You will still need to enter all of the manicure weights for each individual plant.
- After you have selected the Manicure Plants button that manicure batch name cannot be changed or altered. If you have forgotten to add a plant, you can create a new manicure batch with the same name.
- Manicure is not a waste process.
- If you remove a part of the plant prior to harvest with the intent to sell or process it, you will use the manicure feature.
- If a piece of usable material falls off a plant, you can use this feature.

Item Detail

The item detail area of Metrc provides extensive detail about a specific item, be it a package, transfer or plant. Because Metrc is a chain of custody system, each transaction that occurs regarding an item with an ID number has a record along with the characteristics of the transaction. Information included in a plants event store would contain the tag ID number, Strain, movement history, employees who have interacted with the plant and a date and time stamp for each transaction. It is for this reason that anyone with Metrc access should not allow anyone to perform any data entry tasks under their profile.

The screen below shows a typical series of transactions for a plant.

Multiple instances of a plant's history can be shown from one screen.



Item 1: Column Settings

The Column Settings button will allow you to sort Ascending/Descending, change your view of the columns, and filter for certain information in that column.

Item 2: Tool Bar

The tool bar across the top of the Drill Down Feature allows the user to identify the different attributes for viewing of the particular item being shown. By clicking at the top of any column the information is sorted in numeric or alphabetical order in ascending or descending order.

Item 3: Drill Down Arrow

The Arrow next to a plant or package tag will open up to show additional details about the particular ID number. Selecting the arrow once will open it and selecting the arrow a second time will close it.

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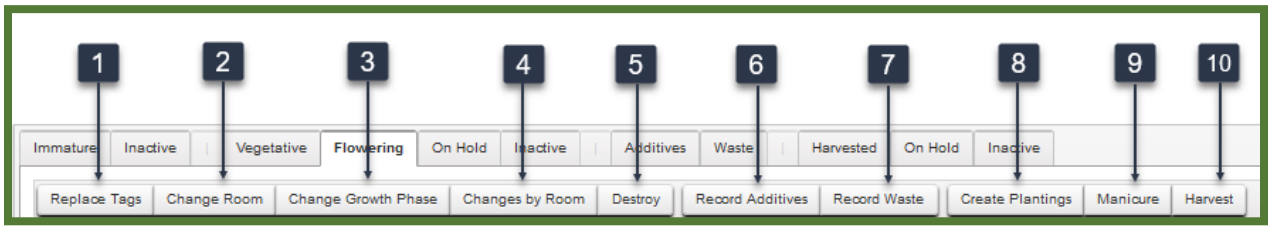
Flowering Plants

The Flowering state is the third part of the growth cycle captured in the Metrc system. Harvesting, the process of cutting down a plant and obtaining the wet weight before initiating the trim process is performed on plants in the flower phase. Marijuana in the form of buds (flower), trim or shake by weight is captured and the product is now ready for the cure process. A harvest is required to be made up of strain specific plants.



The Flowering Plants phase in Metrc is captured with the following functions:

Item 1: Replace Tags

Replace Tags is used to replace a plant tag that is damaged, lost or in some way in need of replacing.

Item 2: Change Room

This can be used to change the room on one plant or multiple plants that you choose to highlight prior to clicking on the Change Room button.

Item 3: Change Growth Phase

Change Growth Phase button is used to change the growth phase on one plant or multiple plants.

Item 4: Changes by Room

Changes by Room is used to move a section of plants or an entire room of plants.

Item 5: Destroy

Destroy Plants button is used to destroy plants, remove them from your active plant counts and put them into your Inactive tab because they are no longer active, viable growing plants.

Item 6: Record Additives

Record Additives tab is used to record additives such as fertilizer, pesticides or other additives by plant.

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Item 7: Record Waste

Record Waste button is where you will record the waste taken from live Vegetative plants.

Item 8: Create Plantings

Create Plantings button is used for cuttings or seeds to be planted in an immature batch.

Item 9: Manicure

Manicure Plants button is used to create a manicure batch when trimming from flowering plants, prior to harvest, in anticipation of selling or processing the product being trimmed off of the plant. If product is being trimmed off of a flowering plant in anticipation of wasting it, that does not get reported in Metrc; it gets reported in the waste log that is located at the Cultivator/Grow.

Item 10: Harvest

Harvest Plants button is used when you harvest your plant(s).

Each of the tabs shown above have specific features and functions and have been broken down individually for easier access and review.

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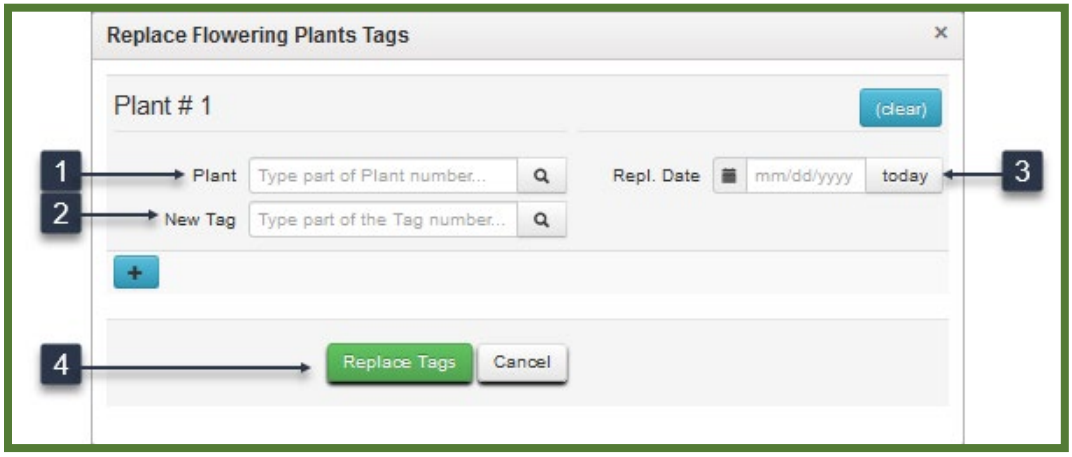
Replace Plants Tag - Flowering

In the event that an ID tag has become lost or misplaced, a tag can be replaced providing a new ID number for that plant. The following form needs to be completed.



Item 1: Plant

Select the plant ID number from the drop down, for the plant tag you wish to replace (original ID).

Item 2: New Tag

Select the new tag number that you want to replace the original tag number with.

Item 3: Replace Date

Enter the date you are replacing the plant tag with a new tag.

Item 4: Replace Tags

Click this button to save the entries and assign the new plant tag number to the plant. Therefore, the old plant ID number is no longer valid.

Remember:

- Replacing a tag should be a rare event
- When you replace a tag that tag will no longer be shown in your system.

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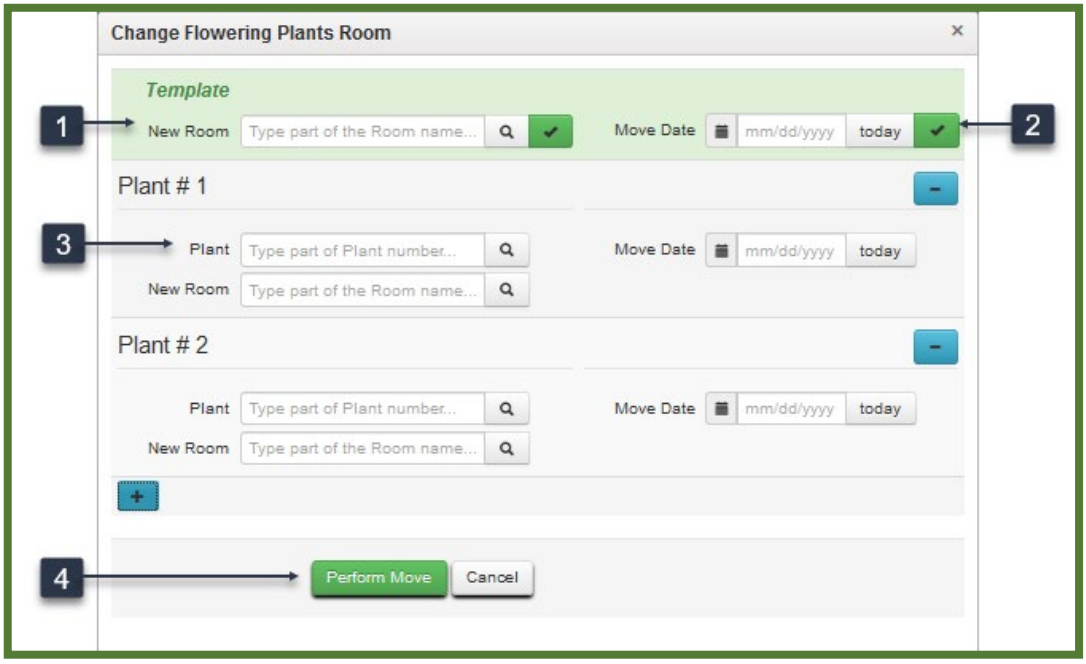
Change Room - Flowering

The change room feature allows you to move plants from one room to another. Plants can be moved one at a time or in multiples.

To select multiple plants, you can use the control (Cmd button on a Mac) or shift buttons on your computer in conjunction with your mouse to highlight all of the plants you would like to move. Simply hold down the control key (Cmd key on Mac) and select the individual plants or hold down the shift key and select the beginning and ending plant and your left mouse key to choose the plants you would like to move. The highlighted plants will be shown in orange.

When you select multiple plants, the change room form will automatically add the template fields. Metrc will allow you to apply single attributes to multiple plants by checking the green check mark on each field in the template area. In the change room area, the New Room and Move Date can be selected one time and applied to all of the plants in the list. See picture below.

This example shows two plants being moved, you may however choose as many plants as you like.



Item 1: New Room

New Room is used to select the new room for the plant(s). Use the drop down to select available rooms (locations) to move the plant(s) to. After selecting the new room, select the apply button to add the new room to all plants in the list.

Item 2: Move Date

Enter the date the plants were/are being moved. After selecting the new date, select the apply button to add the date to all plants in the list.

Item 3: Plant ID

The plant ID number will be populated in sequential order from the orange highlighted list the user initially selected.

Item 4: Perform Move

Click this button to save your entry and move the plant(s).

If you choose to select a single plant, you can simply select the Change Room Button on the far-right end of the page.

When you select the change room button, the following form will open.

Complete the information for all of the plants in the form just as you would have for a multiple move shown in the first example.

Remember:

- In order to use the template for multiple plants, you must click on the plants you want to change by using your mouse and your Control or Shift keys to highlight them in orange in the plants screen before selecting the change room button.
- You can still add or remove plants to the list by using the Blue Add (+) or Minus (-) buttons.
- You can still move plants back to the original phase if you have made an error.
- Changing large numbers of plants may still be faster with the change by room feature.

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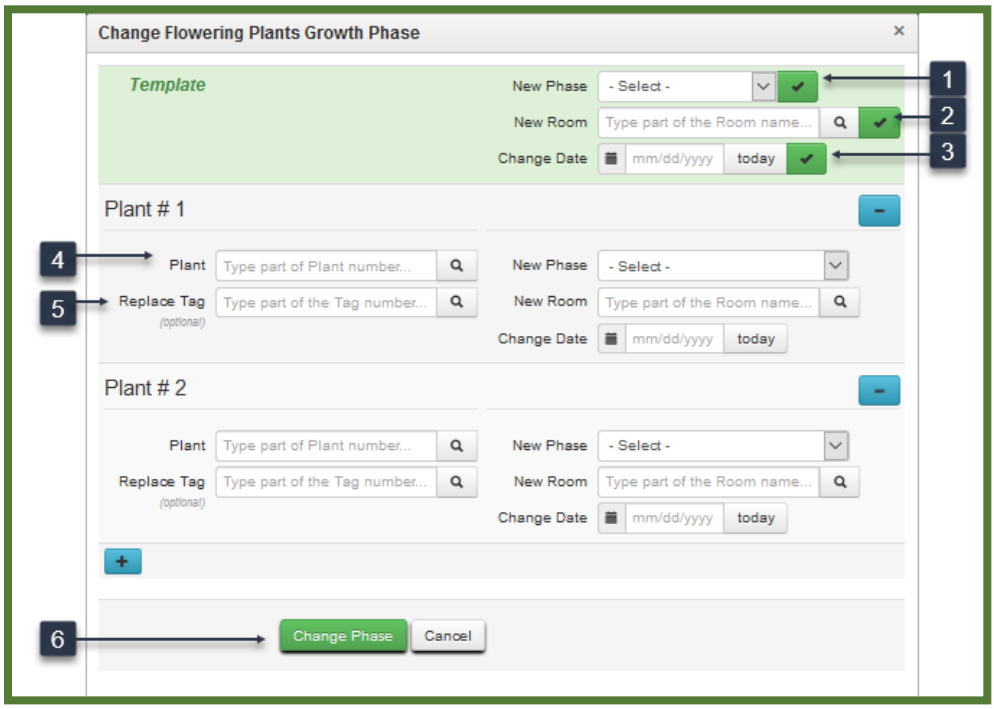
Change Growth Phase - Flowering

The Change Growth Phase feature allows you to change the Growth phase of plants from one phase to another. Plants can be changed one at a time or in multiples.

To select multiple plants, you can use the control or shift buttons on your computer in conjunction with your mouse to highlight all of the plants you would like to move. Simply hold down the control key and select the individual plants or hold down the shift key and select the beginning and ending plant while using the left mouse key. This will select the plants you would like to move.

After highlighting the plants, use your mouse to select the change growth phase button and the Change Growth Phase form below will open.



This example shows two plants being moved, you may, however, choose as many plants as you want.

Item 1: New Phase

Select the phase the plant is moving to. After selecting the new phase, select the green checkmark button to add the new phase to all plants in the list.

Item 2: New Room

Select the room the plant will be moving to in its new phase. After selecting the new room, select the green checkmark button to add the new room to all plants in the list. This is optional, if the plants are not moving rooms or if the plants are moving to different rooms you can choose the same room.

Item 3: Change Date

Enter the date that the plant(s) changed to the new Growth Phase. After selecting the date, select the green checkmark button to add the date to all plants in the list.

Item 4: Plant ID

The plant ID number will be populated in sequential order from the orange highlighted list the user initially selected.

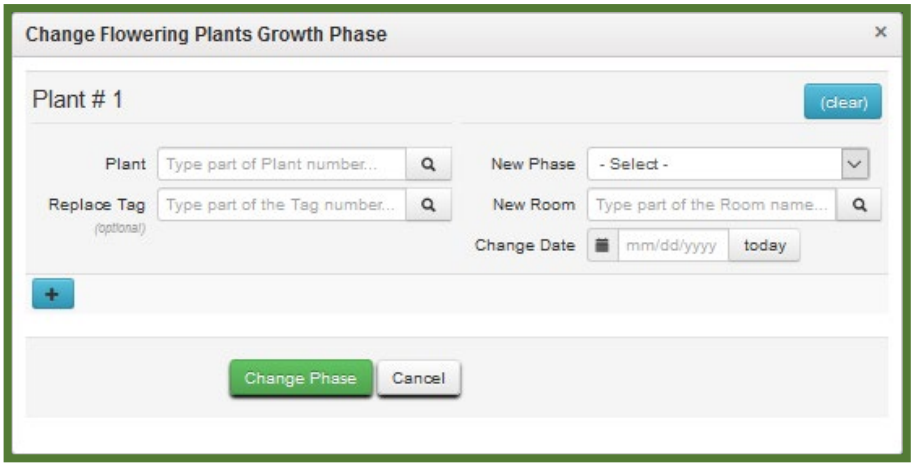
Item 5: Replace Tag (optional)

The plant tag can be replaced at this phase if the tag was lost or misplaced during the change or move process.

Item 6: Change Phase

Click this button to save your entries and selections, to change the phase of the plant(s).

When you select the Change Growth Phase button, the following form will open.



Complete the information for all of the plants in the form just as you would have for multiple plants shown in the beginning example above.

Remember:

- In order to use the template for multiple plants, you must click on the plants you want to change by using your mouse and your Control or Shift keys to highlight them in orange in the plants screen before selecting the change room button.
- You can still add or remove plants to the list by using the Blue Add (+) or Minus (-) buttons.
- You can still move plants back to the original phase if you have made an error.
- Changing large numbers of plants may still be faster with the change by room feature.

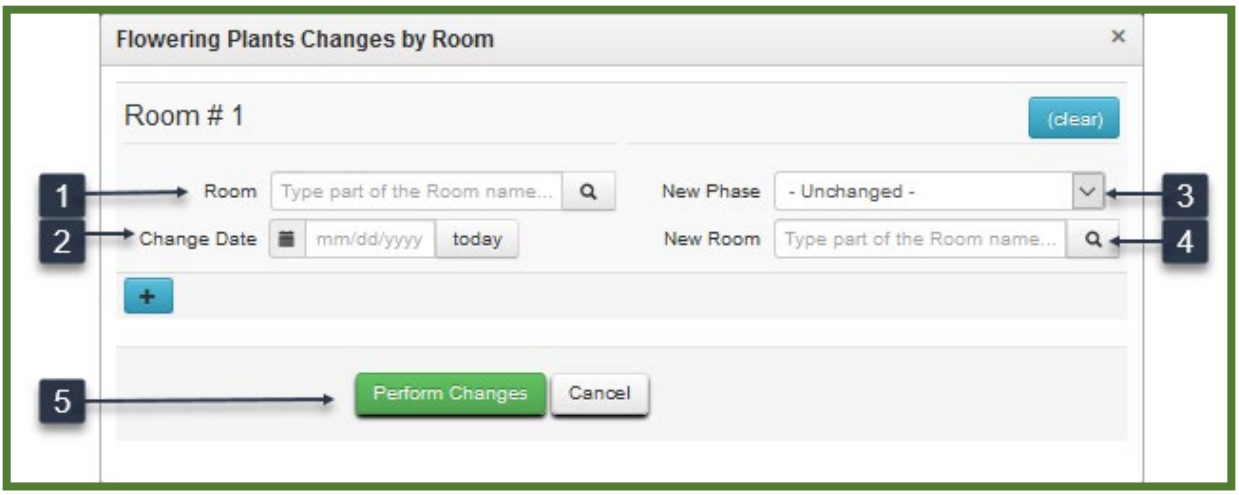
Changes by Room - Flowering

The most efficient way to move a large number of plants is to use the Changes by Room feature. The Changes by Room feature allows a user to change large numbers of plants by room or by phase without having to enter individual plant information. This will require the user to utilize the Changes by Room button in conjunction with a Room. To use this function to its maximum capability, it may require the user to add or modify the Rooms they have already created.

In many facilities, a room may have multiple groups of plants. It is acceptable in Metrc to sub divide a room into multiple sections to match what is being grown in that room. For example: Veg. Room Section 1, Veg. Room Section 2, Veg. Room Section 3 etc.

By utilizing this style of room layout, a user may use the Change by Room feature to move large groups of plants simultaneously without having to input information for each plant.

Keep in mind that the room can stay the same while only changing the phase of the sections of plants in that room. After the rooms have been mapped out accordingly, it is a simple task to perform the new room or new phase function. Simply launch the form in the changes by room feature and select the perform change function.



Item 1: Room

You will select the room containing the plants you want to move.

Item 2: Change Date

Select the date you made the changes to the plants in the room.

Item 3: New Phase

The New Phase menu will allow you to choose the phase the room or section will be changing to without having to enter individual plant information.

Item 4: New Room

The New Room menu will allow you to choose the room or section the plants will be changing to without having to enter individual plant information.

Item 5: Perform Changes button

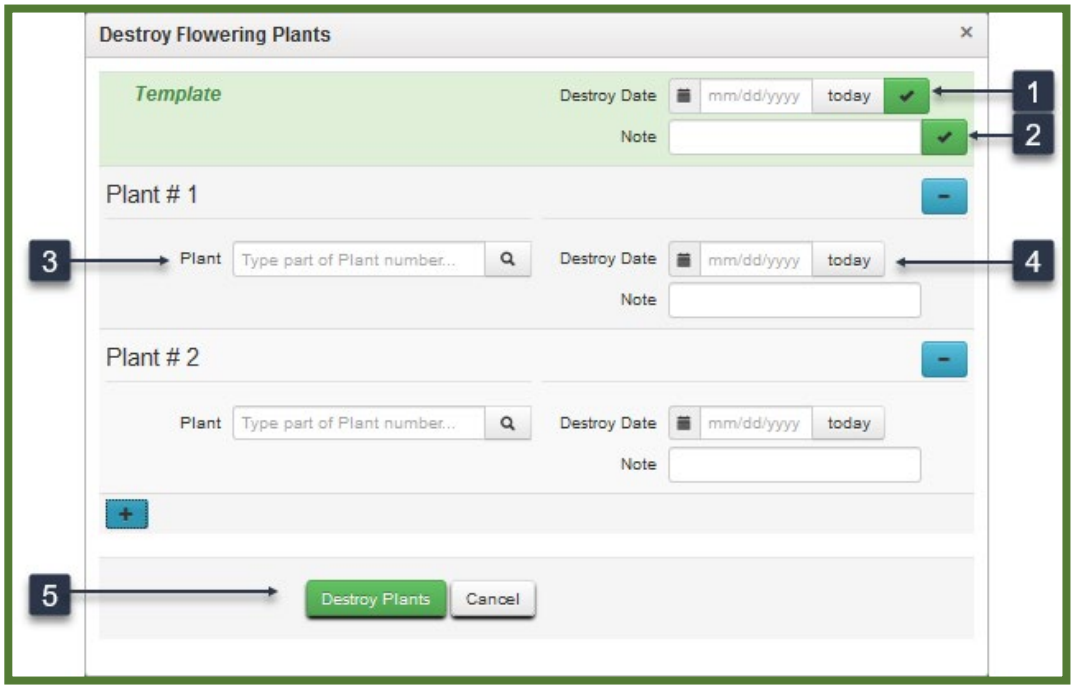
Select the Perform Changes button to save your data and execute the change.

Remember:

- You can move plants using the shift or control buttons (see moving plants for more details).
- Rooms can be added or changed as the need arises, there is no limit on how many rooms you have, the names or how often they are changed or edited.
- A bar-code scanner may be useful in moving small numbers of plants to ensure the correct plant ID is being selected.

Destroy Plants - Flowering

Plants are subject to failure at each stage of the growth cycle. The following form provides the user with a way to destroy plants that have not survived.



Item 1: Destroy Date

Metrc will allow you to apply the date to multiple plants. Enter the date into the Destroy Date field either manually or select today and Metrc will enter the date on your computer. After the date is entered, select the green checkmark button and the date will be applied to all of the selected plants.

Item 2: Notes

Metrc will allow you to apply the note to multiple plants. Enter the note into the field and then select the green checkmark button and the note will be applied to all of the selected plants.

Item 3: Plant ID

The plant ID number shows the plant that will be destroyed.

Item 4: Destroy Date

If you choose not to use the green apply function shown in item 1, you can enter the dates for the plants manually or select the today button.

Item 5: Destroy Plants

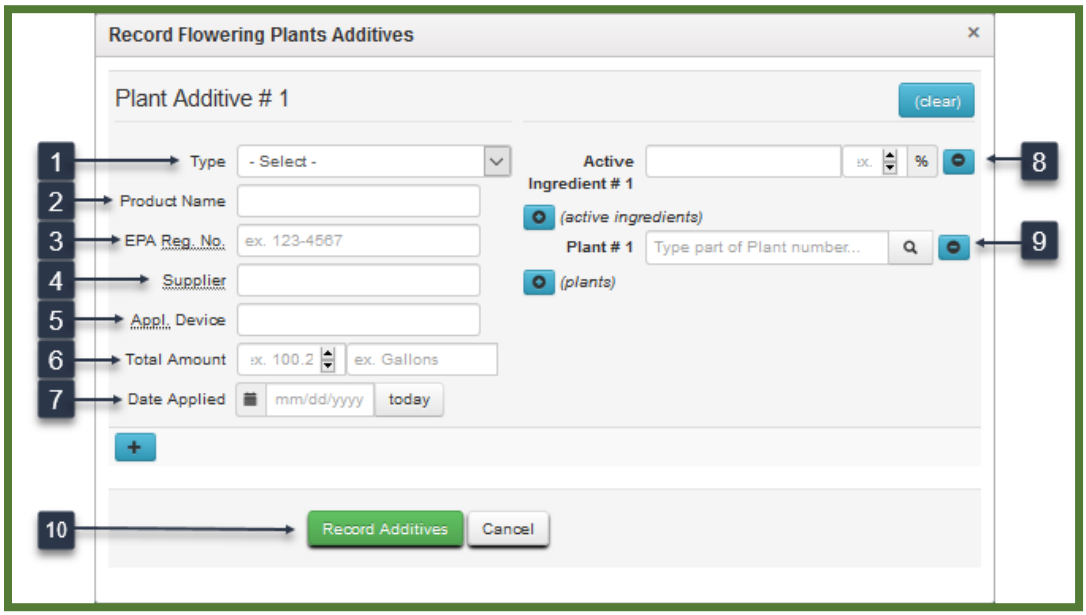
Once all of the information has been entered and verified, select the green Destroy Plants button which will execute the transaction.

Remember:

- Make sure you are destroying the correct plant, once a plant is destroyed it cannot be brought back.
- You should always verify your plant count against the rules to make sure a facility is in compliance with the regulations.
- The destroy plants feature can be used as many times as required. The destroy plants feature is not limited to one time.

Record Additives - Flowering

This area in Metrc is where additives like fertilizer, pesticides and other additives are recorded by plant. Additives may be recorded by room in the Additives Tab. Please see the State's rules and regulations as to whether additives are required to be entered into Metrc.



Item 1: Type

Type is a drop-down menu that will allow you to select the type of additive used on the plant. Fertilizer, Pesticide and other are available to use.

Item 2: Product Name

Product Name Field is where the name of the product used on the plant will be entered.

Item 3: EPA Regulation Number

This is where the EPA regulation number of the additive will be entered.

Item 4: Supplier

Supplier is where the additive was purchased. (Wholesale distributor, Warehouse, CO-OP, etc.)

Item 5: Application Device

Application Device is used to describe the type of Application Device that was used to distribute the Additive on the plants (spray bottle, fine mist, nozzle, measured scoop, etc.)

Item 6: Total Amount

Total Amount is used to describe the total amount of the Additive that was used.

Item 7: Date Applied

Date Applied is used to show exactly what date that the Additive was used on the plant.

Item 8: Active Ingredient

Active Ingredient identifies the active ingredient in the additive. Multiple active ingredients can be added. This is the active ingredient listed on the product being applied and the concentration percentage. Active Ingredients will be stored once they are entered so that active ingredient will show on the dropdown list when logging future additives. The plus sign will allow you to add more active ingredients.

Item 9: Plant #1

The Plant Field identifies the plant or plants that the additive is being applied to. The plus sign will allow you to add more plants to the list.

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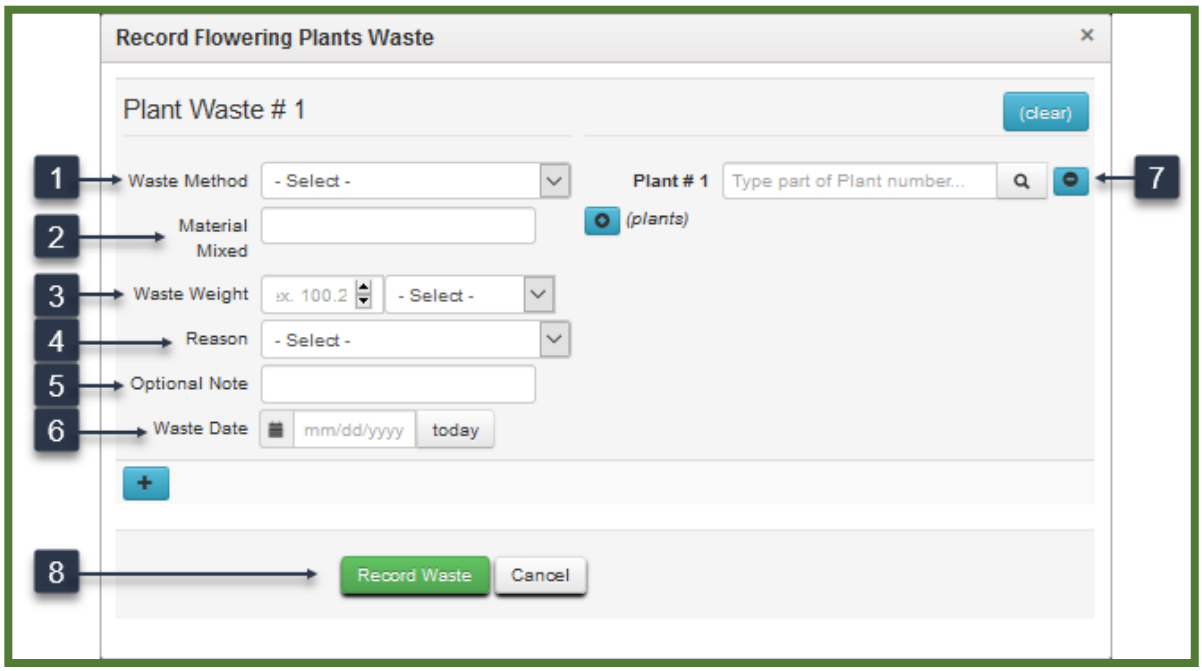
Record Waste - Flowering



Item 1: Waste Method

Select the waste method from the dropdown menu.

Item 2: Material Mixed

Identify the material with which the waste was mixed to dispose of the product in accordance with regulations.

Item 3: Waste Weight

Input the total weight of the product being wasted and select the Unit of Measure from the dropdown menu.

Item 4: Reason

Select the most appropriate reason why the product is being disposed of from the dropdown menu.

Item 5: Optional Note

You may choose to use this area to provide additional information about why you are disposing of the product.

Item 6: Waste Date

Enter the date when you disposed of the material.

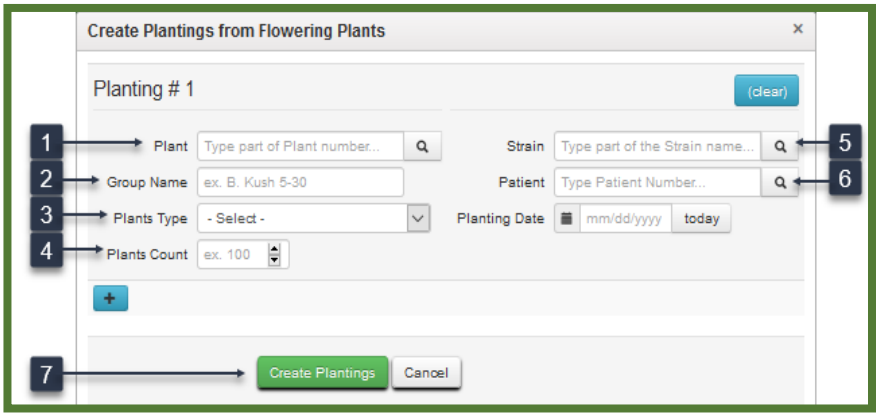
Item 7: Plant Field

Enter the Plant tag number from which the waste came.

Item 8: Record Waste button

Select Record Waste to save the information and exit the screen.

Create Plantings - Flowering



Create Plantings is where cuttings or seeds can be created from a plant in Metrc.

Item 1: Plant Field

Plant Field is where the plant tag ID will be entered that the cutting or seed is coming from. You may use the magnifying glass to see the list of plants available.

Item 2: Group Name

Group Name will auto-populate with the plant tag ID however it is able to be edited into a Group Name that is needed, if you do not wish to use the plant tag ID.

Item 3: Plants Type

Plant type is where clone or seed will need to be selected.

Item 4: Plants Count

Plant Count is where you will explain how many cuttings or seeds were taken from the plant.

Item 5: Strain

Strain Field is where you will specify the strain of the cutting or seeds that were taken from the plant. You may use the magnifying glass to see the available strains to choose from.

Item 6: Planting Date

Planting date is the date the cutting or seed was taken from the plant. You may use the today button to display today's date.

Item 7: Create Plantings

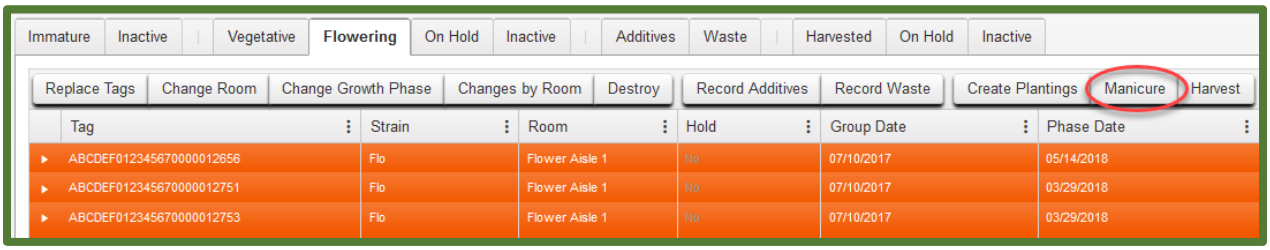
Clicking the create plantings button will create the new batch for the cuttings or seeds taken from the plant.

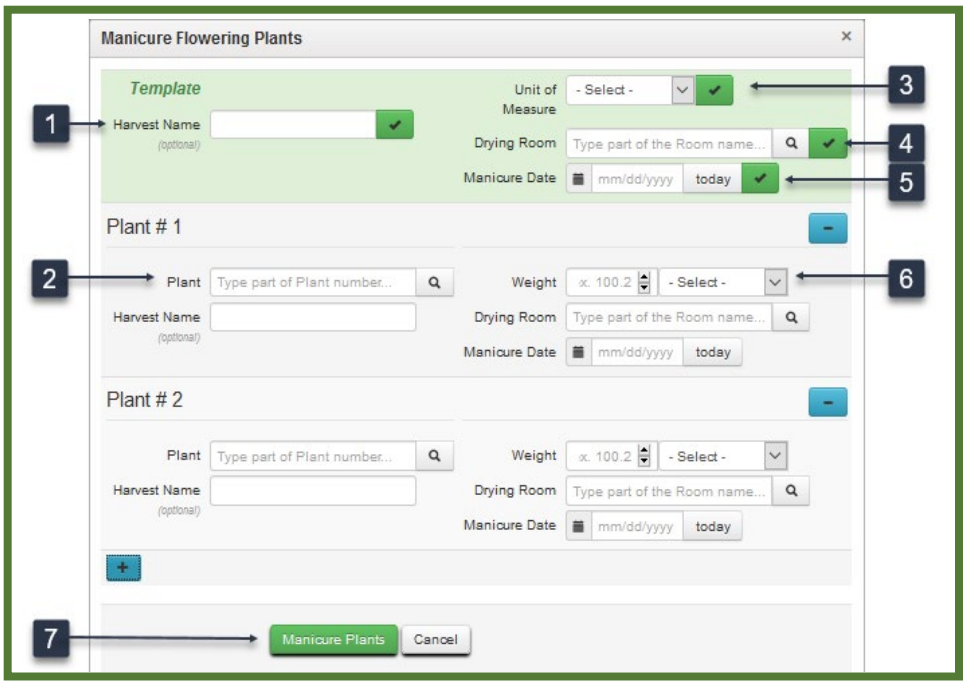
Manicure Plants - Flowering

The Manicure plant process is designed for a business that may remove parts of a plant before harvest with the intention of selling or processing what was removed. To be clear, this is before the primary harvest. The manicure process could also be used if a usable or sellable part of the plant was broken off prior to harvest. The manicure plants feature is not used for waste reporting when all that is being trimmed off of the plant is waste. That waste gets reported into the Cultivator/Grow waste log located at the facility. Manicuring a plant can be done for single or multiple plants.

To Manicure Multiple Plants, select the plants by using the control or shift buttons on your computer in conjunction with your mouse to highlight all of the plants you would like to Manicure. Simply hold down the control or the shift key and the left button on your mouse to select desired plants.

After highlighting the plants, use your mouse to select the Manicure Plants button and the Manicure Plants form below will open.





This example shows two plants in a Manicure Harvest, you may however choose as many plants as needed.

Item 1: Harvest Name:

You may name your Manicure batch by any name, or the system will assign one for you. All Manicure batches are required to have a name. After entering the Manicure Name, select the green checkmark to add the name to all plants in the list. It is suggested that you use the strain name and manicure date in the Manicure batch name.

Item 2: Plant ID

The plant ID number will be populated in sequential order from the orange highlighted list the user initially selected.

Item 3: Unit of Measure

Enter the unit of measure from the drop-down list. After selecting the Unit of Measure select the green checkmark to add the Unit of Measure to all plants in the list.

Item 4: Drying Room

Select the room where the Manicure Harvest is taking place. After selecting the room, select the green checkmark to add the location to all plants in the list.

Item 5: Manicure Date

Select the date of the Manicure Harvest. After selecting the date select the green checkmark to add date to all plants in the list.

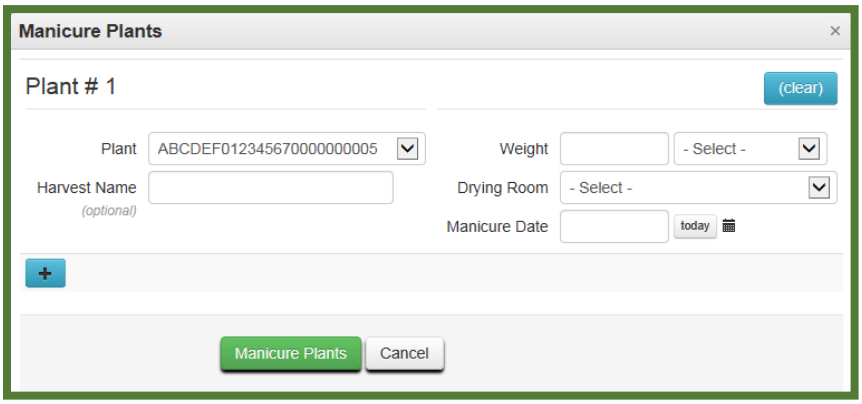
Item 6: Manicure Weight

Enter the weight of the manicure removed from the "pre-harvest" plant. You will have to add the weight for each individual plant in the list.

Item 7: Manicure Plants

Select the Manicure Plants button to create the Manicure Batch and save entries and exit.

When you select the Manicure Plants button the following form will open.



Complete the information for all of the plants in the form just as you would have for a multiple Manicure Plants harvest shown in the beginning example above.

Remember

- In order to use the template for multiple plants you must click on the plants you want to change by using your mouse and your Control or Shift keys to highlight them in orange in the plants screen before selecting the Manicure Plants button.
- It is not required to use all of the apply features, you may choose to use only in certain areas. For instance, a user may choose only the harvest name and date but not the unit of measure or room.
- When you choose the apply button it will add that information to every plant in the list, so make sure you have chosen only the plants you wish to manicure.
- You can still add or remove plants to the list by using the Blue Add (+) or Minus (-) buttons.
- You will still need to enter all of the manicure weights for each individual plant.
- After you have selected the Manicure Plants button that manicure batch name cannot be changed or altered. If you have forgotten to add a plant, you can create a new manicure batch with the same name.
- Manicure is not a waste process.
- If you remove a part of the plant prior to harvest with the intent to sell or process it, you will use the manicure feature.
- If a piece of usable material falls off a plant, you can use this feature

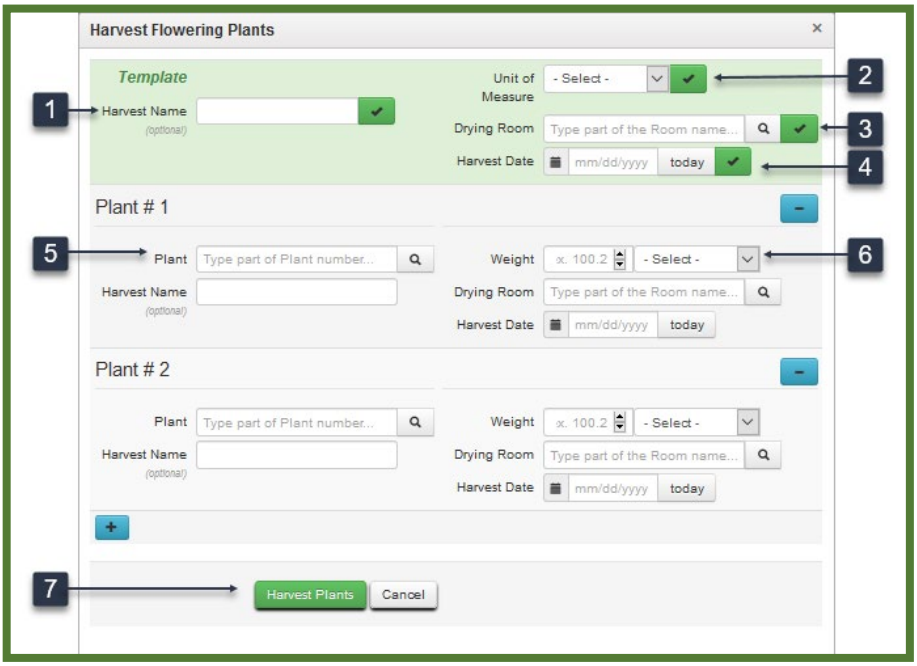
Harvesting Plants - Flowering

The Metrc system was designed to create a Harvest Batch capturing the weight of the plants as described in the rules and regulations. In this process each plant has been moved into the harvest stage, individually weighed and entered into Metrc providing not only individual weights for the plants but also a total wet weight for the Harvest Batch.

It is best business practice for the harvests to be strain specific, however, please check your state supplemental/rules regarding this. The Harvesting Process can be used for individual or multiple plants. Multi-Plant Harvesting will apply a single entry for the Harvest Name, Unit of Measure, Cure or Harvest Room and Harvest Date. There is no limit to how many plants you can choose to create a Harvest Batch.

To begin the process, you will select multiple plants which can be done by using the control or shift key and your left mouse button, selecting the plants you want to harvest. For simplicity purposes we have shown a harvest of 2 plants in the example below.

Once you have selected the plants you want to harvest, use your mouse to select the harvest plants button which will open the form below.



After the form is opened you will have the option of either entering the harvest and plant information individually or using the upper template portion of the form shaded in green to "apply" the information to all of the plants selected.

Item 1: Harvest Name

A harvest must always have a Harvest Batch name. The Harvest Name can be whatever a business chooses. We recommend using the Strain and Date of the harvest. If a name is not selected, Metrc will create a name for the harvest using the date and the room it was harvested into (i.e. 2019-02-03-Harvest Room-H). After selecting the name choose the

apply button to add the name to all of the specified plants.

Item 2: Unit of Measure

This is where you may select the unit of measure you want to use for each plant. It is not a requirement to use the same unit of measure if this is not the preferred method. If you choose to apply the same unit of measure, enter into this field and select the green checkmark button to add to all of the specified plants.

Item 3: Drying Room

The Drying Room field is where you can select the room you will be performing the harvest in. This can be the same for all plants but is not required. If the operation is performed in the same room enter the information and select the green checkmark to add to all of the plants.

Item 4: Harvest Date

Select the harvest date by using the today button or manually entering the information in the field and selecting the green checkmark.

Item 5: Plant ID

The plant ID number will be populated in sequential order from the orange highlighted list the user initially selected.

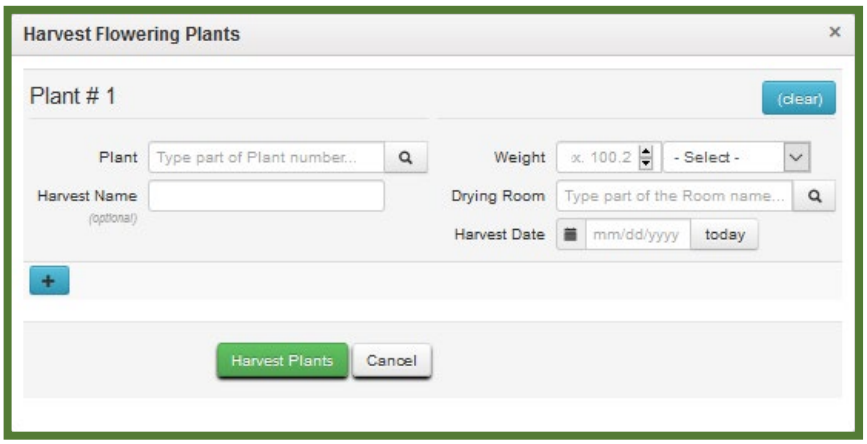
Item 6: Weight

Each plant is required to have its weight entered individually, for each plant.

Item 7: Harvest Plants

Selecting the Harvest Plants button will create a new harvest batch made up of all of the selected plants with the information provided in all of the fields. Before selecting the Harvest Plants button the user should verify all of the information is both correct and accurate.

To create a single plant Harvest, select the Harvest Plants button on the far-right side of the page. When you select the Harvest Plants button, the following form will open.



Complete the information for all of the plants in the form just as you would have for a multiple Plants Harvest shown in the first example above.

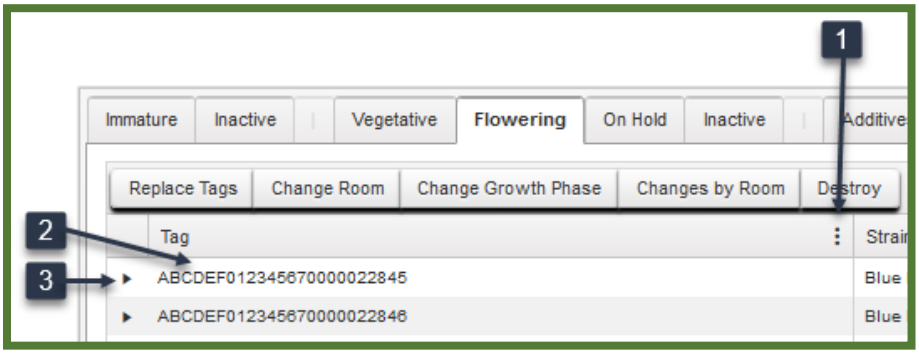
Remember

- In order to use the template for multiple plants you must click on the plants you want to change by using your mouse and your Ctrl or Shift keys to highlight them in orange in the plants screen before selecting the Harvest Plants button.
- It is not required to use all of the apply features, you may choose to use only in certain areas. For instance, a user may choose only the harvest name and date but not the unit of measure or room.
- When you choose the green checkmark button it will add that information to every plant in the list, so make sure you have chosen only the plants you wish to harvest.
- You can still add or remove plants to the list by using the Blue Add (+) or Minus (-) buttons.
- You will still need to enter all of the plant weights for each individual plant.
- After you have selected the Harvest Plants button, that harvest cannot be changed or altered. If you have forgotten to add a plant, you can create a new harvest with the same name. By using the same exact name, all newly harvested plants will go into the existing batch until 12am EST IF all harvest details are the same including the same harvesting date.

Item Detail

The item detail area of Metrc provides extensive detail about a specific item, be it a package, transfer or plant. Because Metrc is a chain of custody system, each transaction that occurs regarding an item with an ID number has a record along with the characteristics of the transaction. Information included in a plants event store would contain the tag ID number, Strain, movement history, employees who have interacted with the plant and a date and time stamp for each transaction. It is for this reason that anyone with Metrc access should not allow anyone to perform any data entry tasks under their profile.

The screen below shows a typical series of transactions for a plant.



Item 1: Column Settings

The Column Settings button will allow you to sort Ascending/Descending, change your view of the columns, and filter for certain information in that column.

Item 2: Tool Bar

The tool bar across the top of the Drill Down Feature allows the user to identify the different attributes for viewing of the particular item being shown. By clicking at the top of any column the information is sorted in numeric or alphabetical order in ascending or descending order.

Item 3: Drill Down Arrow

The Arrow next to a plant or package tag will open up to show additional details about the particular ID number. Selecting the arrow once will open it and selecting the arrow a second time will close it.

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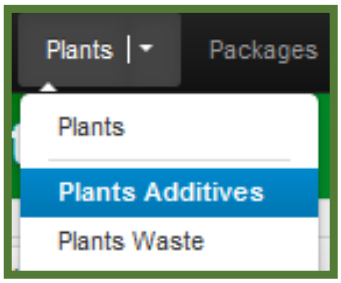
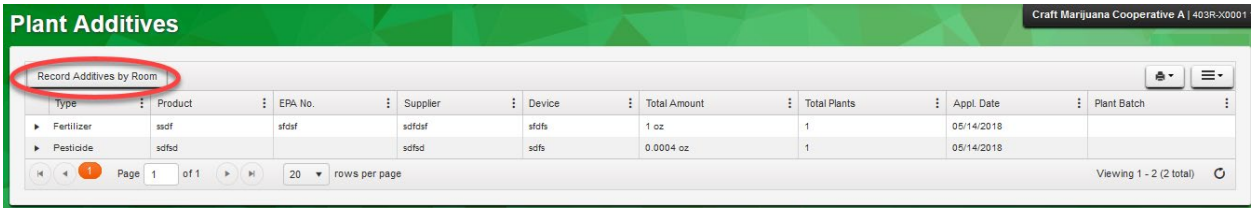
Additives Tab

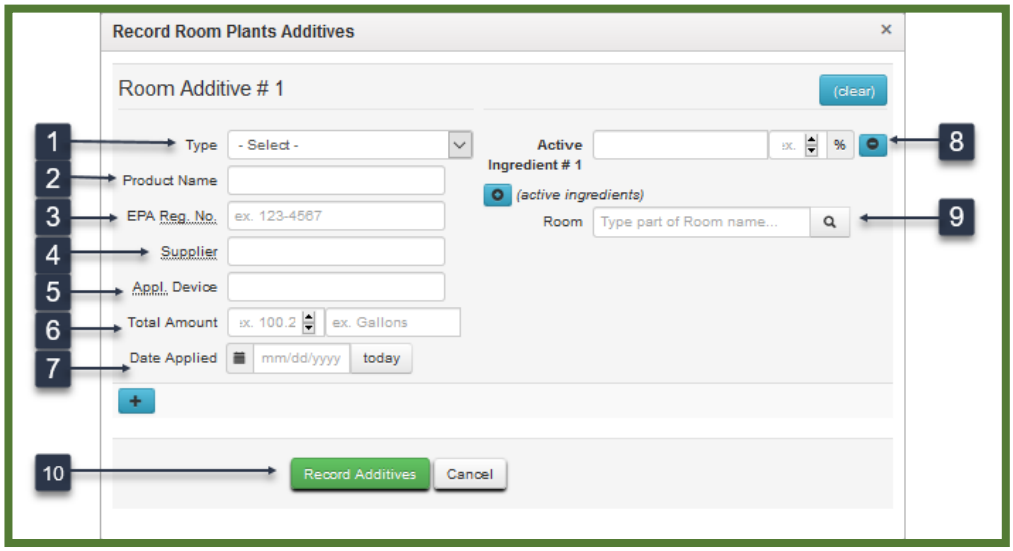
Additives Tab is where additives by room can be added. Please check the State's rules and regulations as to whether additives are required in Metrc. Additives include fertilizer, pesticides, etc. Additives can also be added per plant in the vegetative and flowering phases.





Additives by Room

Additives by Room will allow you to add additives by room instead of by plant. Please see the State's rules and regulations as to whether additives are required in Metrc.



Item 1: Type Field

Type field is used to select the type of Additive used, fertilizer, pesticide or other.

Item 2: Product Name

Product Name is the name of the additive product used on the room.

Item 3: EPA Regulation Number

EPA Reg. No. is the EPA regulation number assigned to the additive used.

Item 4: Supplier

Supplier field is used to state where the additive was purchased.

Item 5: Application Device

Appl. Device is used to state what appliance device was used to disburse the additives to the room. This can be a sprayer, fine mist, scoop, etc.

Item 6: Total Amount

Total Amount is the total amount used on the room.

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Item 7: Date Applied

Date Applied is when you applied the product to the room.

Item 8: Active Ingredients

Active Ingredients is the active ingredient and percentage found in the Additive.

Item 9: Room

Room is the room the additives were used in. You may use the magnifying glass to see the rooms available for use.

Item 10: Record Additives

Record Additives button is clicked to record the additives to the room. Please do not click this until you have checked that all information is correct.

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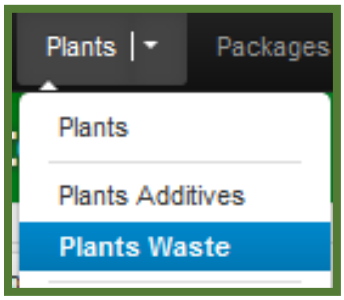
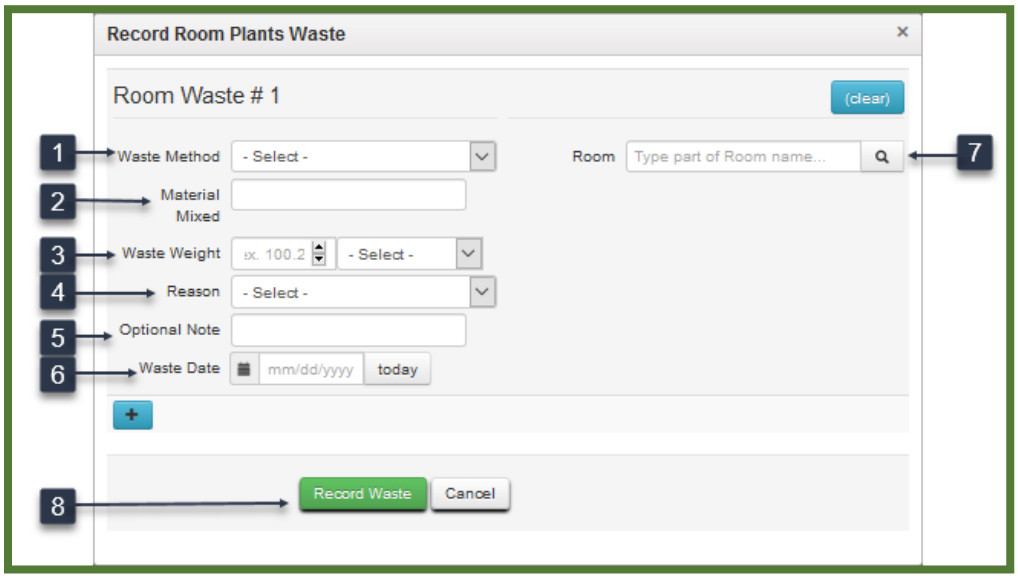
Waste Tab

Waste Tab is where waste by room can be added. Please check the State's rules and regulations as to whether waste is required to be entered in Metrc. Waste can also be added per plant in the vegetative and flowering phases.



Record Waste by Room

Record Waste by Room will allow you to add waste by room instead of by plant. Please see the State's rules and regulations as to whether waste is required to be entered into Metrc.



Item 1: Waste Method

Select the waste method from the dropdown menu.

Item 2: Material Mixed

Identify the material with which the waste was mixed to dispose of the product in accordance with regulations.

Item 3: Waste Weight

Input the total weight of the product being wasted for the whole room and select the Unit of Measure from the dropdown menu.

Item 4: Reason

Select the most appropriate reason why the product is being disposed of from the dropdown menu.

Item 5: Optional Note

You may choose to use this area to provide additional information about why you are disposing of the product.

Item 6: Waste Date

Enter the date when you disposed of the material.

Item 7: Room Field

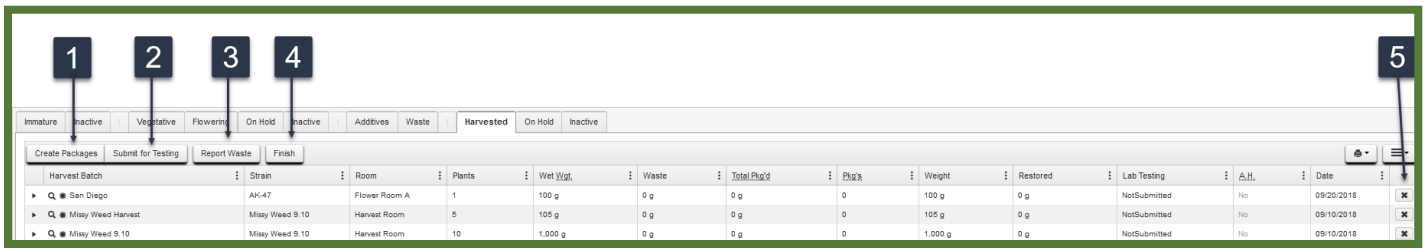
Enter the Room name from which the waste came.

Item 8: Record Waste button

Select Record Waste to save the information and exit the screen.

Harvested Plants

The Harvested Plants is the fourth and final phase of the growth cycle captured in the Metrc system. At this point, the plant has already been cut down and the wet weight has been captured. At this stage, the plant is now completing the curing process and the waste and package process is performed on the harvest. Marijuana in the form of buds or shake (by weight) is packaged and transferred or processed into hash or infused product. A Unique RFID label is assigned to the package in the Harvested state.



Item 1: Create Packages button

The Create Packages button is used to create packages of Bud (flower), Shake or Trim from the Harvest or Manicure Batch. As the packages are created, the overall wet weight will go down. All packages of Bud (flower) must be strain specific.

Item 2: Submit for Testing button

Submit for Testing Button is used to submit the harvest batch for testing. Please see the States rules and regulations as to whether your product should be tested from the harvest batch or in the packages area.

Item 3: Report Waste button

Report Waste button is used to report waste for a specific harvest or manicure batch. All waste must be reported on the day it is created.

Item 4: Finish Batch button

Finish Batch button is used to finish a Harvest or Manicure batch once all packages have been created and all waste has been reported. Any weight remaining in the harvest will automatically be attributed to moisture loss. There should always be weight left in a harvest batch to account for the moisture loss for that harvest batch.

Item 5: Discontinue button

The discontinue button can be used to discontinue a harvest. This will restore the plants back to the Flowering tab and they will be active plants again. A harvest may only be discontinued if it was created less than 48 hours ago, and no waste has been reported, nor any packages created.

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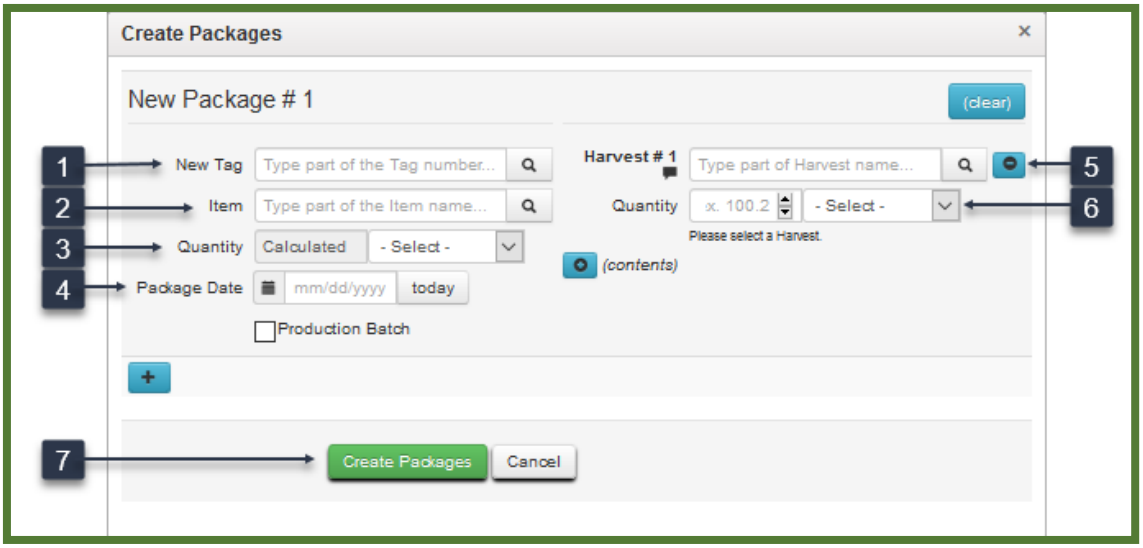
Create Package - Harvested

Because Metrc is a chain of custody, packages of buds or shake/trim are created from the harvest or manicure batch. The creation of a new package requires the removal of product from a Harvest or Manicure batch which is why the packages are created in the harvested area.



Packages created in this screen will be available for adjustment in the package screen and viewed in the transfers area.

Item 1: New Tag ID

Select the package tag ID number from the drop-down menu. Put this tag on the shipping container (bag, jar, container, etc.) This will be required before it can be transferred.

Item 2: Item Selection

This is where you will select the Item that you are packaging. If you do not see the item in your drop-down menu you should review the item list for the facility and confirm it has been created in your item list.

Item 3: Package Quantity

The Package Quantity is auto calculated by what is based on the quantity entered on the right side and the unit of measure chosen to package. The unit of measure for the package must be selected. For example, pounds can be selected on the right side and grams can be selected on the left side and it will convert from pounds to grams.
The grams calculation is based on 453.6 grams.

Item 4: Package Date

Select the date for the creation of the package.

Item 5: Harvest #1

Select the Harvest or Manicure Batch from which you are packaging. You will continue to package from this harvest batch until all sellable or processable material is gone.

Item 6: Quantity

Enter the weight of the package. Remember you must follow the State's rules for packages. Metrc does not stop you from exceeding the maximum amounts for packages. Metrc is a reporting tool providing visibility for what is actually being done.

Item 7: Create Packages

Once you have completed all of the fields in the form, you will select the Create Packages button to complete the transaction.

Remember

- When you create packages from a Harvest Batch, you must create them from the Plants menu under the Harvested Tab (not the packages menu). This will associate your package to the Harvest Batch.
- When packages are created from the harvest batch, the overall wet weight will be decreased by the amount of the new package.
- Always verify you have selected the correct unit of measure for each product.
- You cannot adjust a package from the harvested screen.

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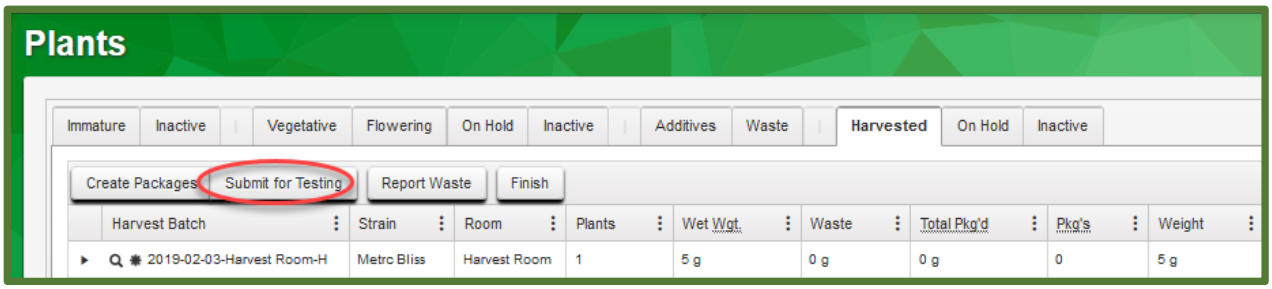
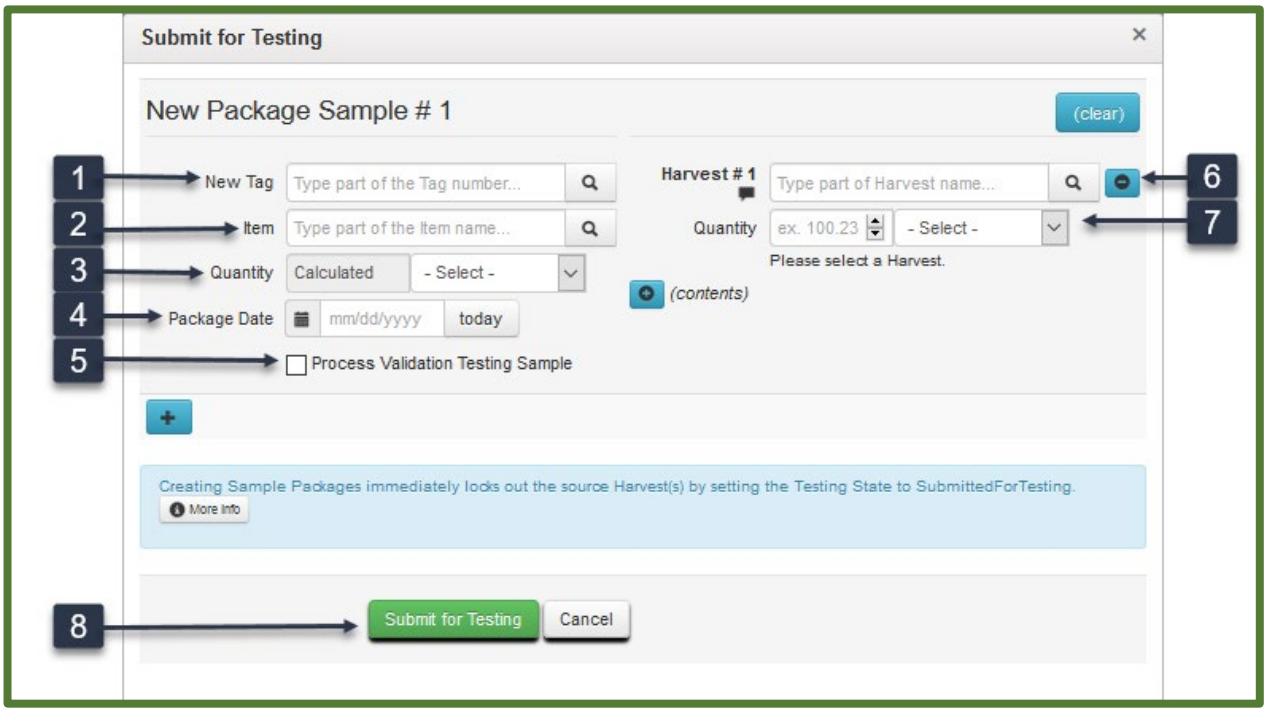
Submit for Testing - Harvested

Submit for testing in the harvested area is where you may submit a Harvest Batch for testing. Please see the State's rules and regulations as to whether you will need to submit a harvest batch for testing or test from packages.





Item 1: New Tag

New Tag is where the new package tag will be applied to the testing sample. You may click the magnifying glass to see the available package tags to assign.

Item 2: Item name

Item Field is the Item name for the test sample. The item name should reflect the item name of the harvest you are pulling from. You may click the magnifying glass to see the available harvest batch.

Item 3: Quantity Field

Package Quantity is auto calculated by what is entered to the weight amount on the right side of the box. The unit of measure for the package must be selected. For example, pounds can be selected on the right side and grams can be calculated on the left side. The grams calculation is based on 453.6 grams.

Item 4: Package Date

Select the date for the creation of the test sample.

Item 5: Process Validation box

Process Validation box is checked for any test sample that a licensee is using for their process validation.

Item 6: Harvest Field

Select the Harvest or Manicure Batch you are packaging from to test. Please see the State's rules and regulations as to whether test samples should be pulled from a Harvest Batch or packages.

Item 7: Quantity

Quantity on the right side is how much you are pulling out of the harvest batch to test.

Item 8: Submit for Testing

Submit for Testing button is used once you are ready to create your test sample.

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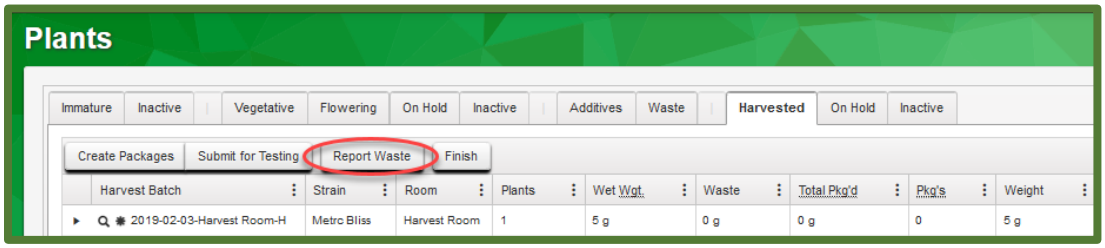
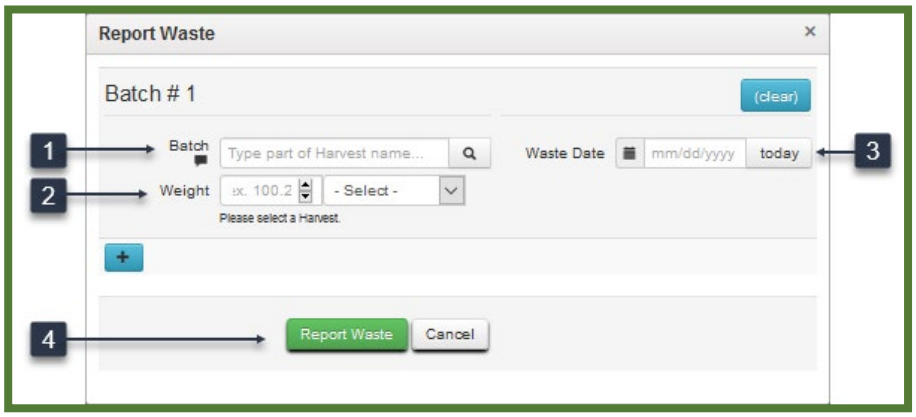
Report Waste - Harvested

Reporting waste for each harvest is required. Reporting waste can be either wet or dry and can be done multiple times during a harvest.





Item 1: Harvest Batch

This is where you identify in which harvest you are working.

Item 2: Weight

Enter the amount of waste for the harvest

Item 3: Waste Date

Enter your date for reporting waste.

Item 4: Report Waste

Select this button when you are ready to report waste and save your work.

Remember:

- Waste can be either wet or dry
- You can report waste multiple times
- You do not report waste pre-harvest in Metrc.

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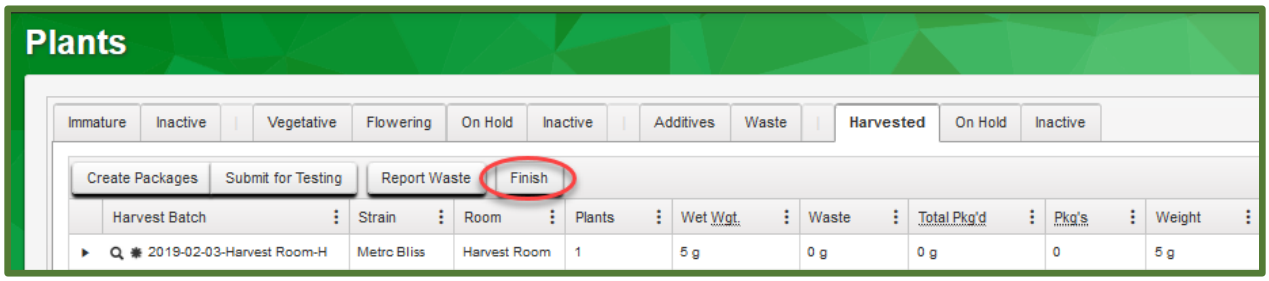
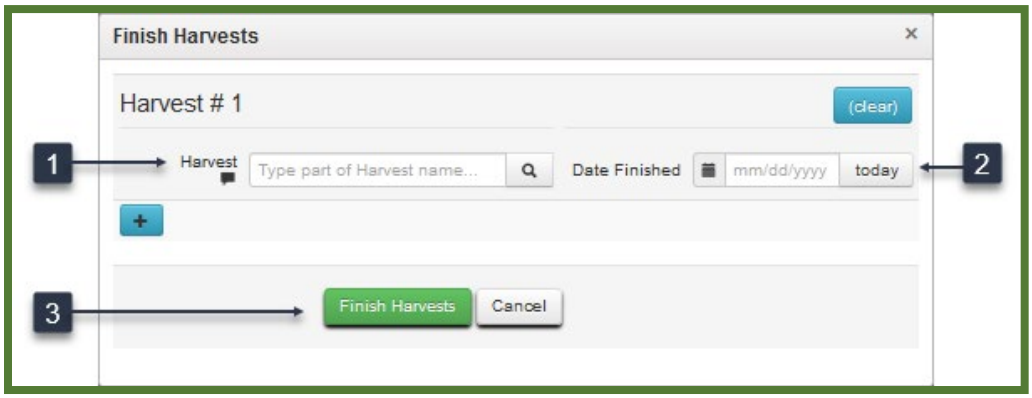
- Your Harvest Batch waste can be reported for the whole harvest batch.

Finish Batch





Item 1: Harvest Name

Select the harvest batch you wish to finish. This means that all of the waste has been reported and the usable product has been packaged.

Item 2: Date Finished

Enter the date you finished your Harvest Batch.

Item 3: Finish Harvest

Select the Finish Harvests button to save your entries and exit the screen. This will remove the Harvest Batch from your screen. Should you make a mistake, please switch to the Inactive Tab to the right of Harvest Tab and highlight the finished harvest batch and click the Unfinish Button to bring that harvest batch back to active.

Remember:

- When a harvest batch is complete, it is very likely to have remaining weight, this is attributable to moisture loss.
- After all the product is packaged and no waste remains in the Harvest Batch, finishing the batch will take the remaining balance to "moisture loss".

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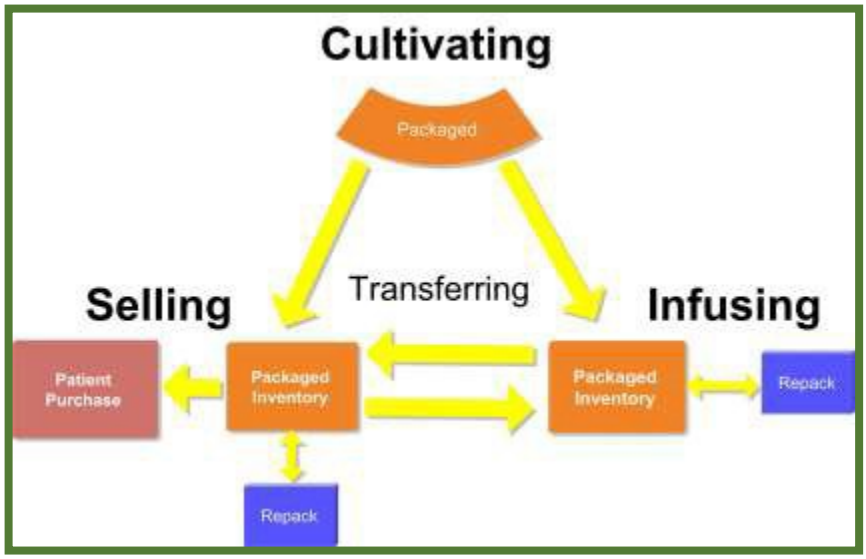
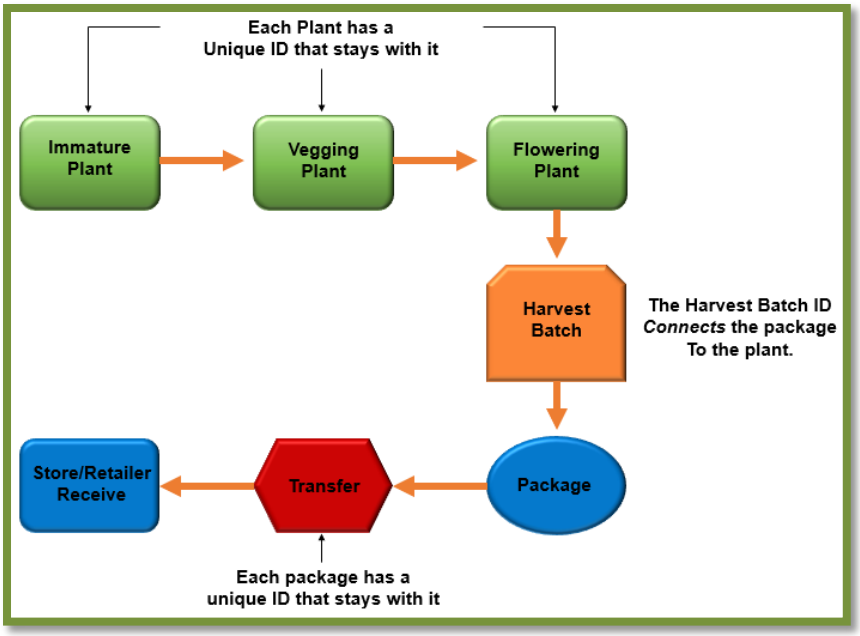
Packages

Metrc is a reporting system with a chain of custody. The package ID numbers are what allows the product to be tracked from a harvest batch though a transfer to a point of sale system. In order to move any product, it must be in a package. You will see, in the transfers section of the manual, it is actually not possible to create a transfer without a package. The following Graphic shows how and where packages are created as well as where packaged product can move to andfrom.



There are two types of tagged inventory in Metrc; Plants and Packages and these two forms of tagged products allow Metrc to accurately manage and report the chain of custody between the grow and the sale. The two key terms in the previous sentence are *"report"* and *"chain"*. Let us first focus on the word "Chain". From the immature plant all the way to the final transfer received at the store, Metrc will always be able to track a product from one ID number to another. If you cannot see a connection from one point to another the chain is broken and the process is incorrect. Please see the graphic below.



The only place where a Metrc tag does not represent a point in the process is in the Harvest Batch as we saw in the plants section. The harvest batch does not have a tag but still has an ID. The harvest batch ID, is assigned by the grow or Metrc will assign it automatically. The harvest batch ID connects the plant ID number to the package tag ID number. In this way we have connected all of the points of the chain of custody tracking from one point to the next. Because of this chain of custody, Metrc allows the person(s) handling the plant, batch or package to "report" on the movement of the product from one stage to the next. Remember, a harvest batch can be made up of many plants. In this way the harvest batch is a many to one relationship. Conversely the harvest batch is a one to many relationships with one harvest batch equaling many packages. As we saw in the plants section, packages in a grow are *always* created from the harvest batch.

When creating a package, it is also important to remember that packaging is based on the shipping rules. If your state has a limit on packaging, i.e. A limit of 1 pound of Bud to package and manifest, then each pound of Bud would require a package tag. However, that does NOT mean that every individual item needs to have a tag on it. For example: quarters, eighths, or ounces can be bundled together to make up a 1lb package that would receive a tag. If a business pre-packages product into ounces, eighths, or quarters, each pre-pack could be bundled into a 1lb package with one unique package tag. Infused products can have multiple, mixed items in each package. Each individual item does not require a unique tag. Remember Metrc does not set rules so please refer to your state's rules and regulations to ensure your packages are in compliance.

When you are creating a package for raw product, it should NOT be done from the Packages tab. Creating new packages for raw product should come from the harvest batch. This is accomplished from the Plants Section, Harvested Tab, then Create Packages (see create package page). The chain of custody requires the package be associated to the harvest batch and by creating a package under the Packages tab, it will NOT refer to the harvest batch.

Packages Tab

Please note that the options under the Active Tab may differ depending on your license type. i.e. If your license is not a grow, you will not see the Create Plantings and Unpack Plants options.

Item 1: Active

Active Tab shows what active packages are currently in a business facility.

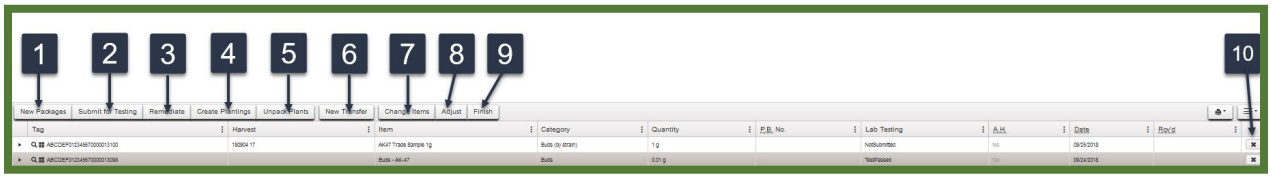
Item 2: On Hold

On Hold Tab shows what packages are currently on Administrative hold by the state.

Item 3: Inactive

Inactive Tab shows all packages that have been discontinued or finished and are no longer active in a business facility.

Active Package Tabs



Item 1: New Packages

The new package area in practice is a re-package used for Infused Products or re-packaging of existing products. Select New Packages in this area to repackage an existing tag.

Item 2: Submit for Testing

Submit for Testing button is used to create test samples of a product that is to be sent to a testing lab. For more information regarding testing samples, see the Testing area for more details.

Item 3: Remediate

Remediate button is used to remediate Test Failed product.

Item 4: Create Plantings

Create Plantings is used to Create Plantings from a Plant package. A plant package will have a leaf icon next to the package tag number instead of the 4 gray boxes. The create plantings button will create an immature batch from the package.

Item 5: Unpack Plants

Unpack Plants is used to Unpack Plants from a package of Vegetative Plants. This feature is not to be used to unpack immature clones.

Item 6: New Transfer

New Transfer is used by clicking one or multiple packages that need to be transferred, then clicking on the New Transfer button. This will put those packages onto a manifest transfer for you. See Transfers for more details.

Item 7: Change Items

Change Items is used to change the Item of a package without using a new tag. This will only work if the package was created less than 24 hours prior, and will not allow you to change a weight based item to a count based item or vice versa.

Item 8: Adjust

The Adjust Packages button is used to adjust existing packages. See adjust package page for more details.

Item 9: Finish

Finish Packages button is used to finish an active package(s). In order to finish a package, the quantity or weight must be at zero.

Item 10: Discontinue

The Discontinue package button is used to remove a package that has been created in error and restore the weight back to the source that the package was pulled from. Once a package has been modified in any way or transferred it can no longer be discontinued.

Package Definition - The amount of marijuana or marijuana infused product that may be sold, processed or transferred and must be placed into one or more containers, each container having its own unique RFID tag.

Remember:

- There are two types of tagged inventory in Metrc; Plants and Packages.
- Packages are created from immature plants, harvest batches or other packages.
- The system allows for any package to be “re-packaged” into smaller units for sale or combined into larger packages for transfer.

- Once a package has been adjusted in any way it can no longer be discontinued.
- A package must exist in order for it to be selected for transfer.
- Transfers are real-time inventory dependent.
- Returned product to a processor will require a new tag to transfer back, unless the entire package is being returned. If there are sales on a package that is being returned to a vendor, it must be repackaged onto a new tag with no sales.

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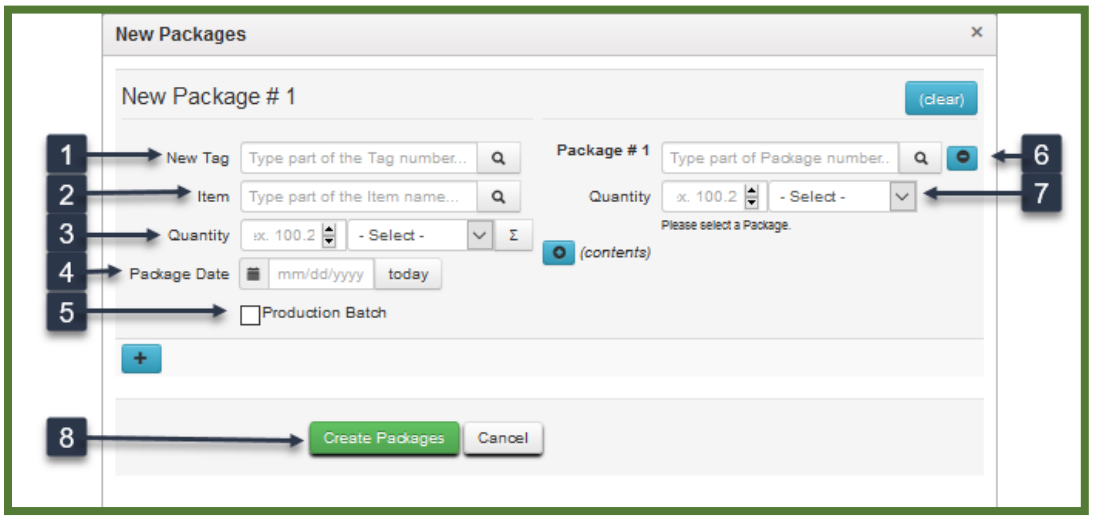
New or Re-Packaging

The new package area in practice is a re-package used for Infused Products or re-packaging of existing products. You should first select the existing packages that you are pulling from in order to make the new product for your package. If you select the New Packages button without choosing an existing package first, then you will simply need to fill out the contents section on the right. The contents section displays the information of the source package that you are pulling from/repackaging.

A user can select as many existing packages as required to make the new package by selecting the Add (plus) contents button at the bottom of the page. Every time a new package is added, another Add button will appear at the bottom of the page.



Item 1: New Tag ID

Select the new Package Tag ID number from the pull-down menu.

Item 2: Item

Select the New Item the package will become. This will be populated from the items you created in the Admin section.

Item 3: New Package Quantity

This will be the new quantity of the package. If you will be making this from multiple packages take extra care in making sure the units of measure match and the quantity is correct. It is recommended to use the Auto-Sum button to the right when there are multiple packages in the contents section. This feature will automatically add up your quantities on the right and input that sum on the left..

Item 4: Package Date

Select the date for the new package.

Item 5: Production Batch checkbox

Check this box if the new package is a production batch.

Item 6: Existing Package ID

This will be the package the material is being pulled from to create the new package. Please take extra care to make sure the package is the correct package you wish to pull from.

Item 7: Existing Package Quantity

This is the quantity of product you are pulling from the existing package. Please take caution to ensure this is correct. Please note the contents removed from this package are not done automatically. The user will need to put the content amount in the field. When putting in the amount, the user should not use negative numbers.

Item 8: Create Packages

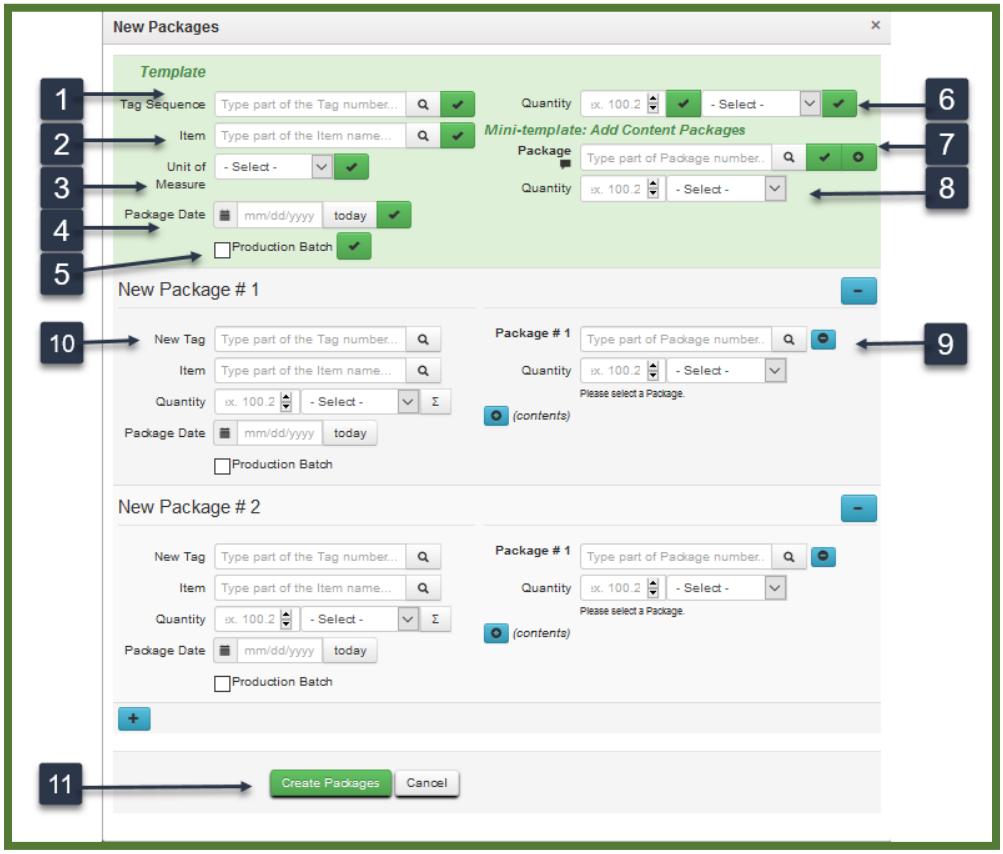
Once you have finished creating the package you will select the Create Packages button to save your entries and record the new package.

Remember:

- From the existing package, the contents removed from this package are not done automatically. The user will need to put the contents amount in.
- The chain of custody may not be broken. If you repackage a product you must indicate the contents.
- All packages from a Harvest Batch are created from the Harvested Tab under the Plants area.
- Package Tags may only be used once.

Splitting Package

Splitting packages is very similar to re-packaging. In this case you will need to reverse the process as shown in the re-packaging section. Simply select the package you wish to split and create as many new packages as desired from the original package as shown in the graphic below.



Item 1: Tag Sequence

If the 2 or more new packages being created will be tagged sequentially, you can use the Tag Sequence feature and it will assign new tags sequentially starting with the tag of your choice.

Item 2: Item

If all of the new packages will have the same item, choose the new item and select the green checkmark to apply to all new packages. Otherwise, select each item individually for each package below.

Item 3: Unit of Measure

If all of the new packages will have the same unit of measure, select the unit of measure and select the green checkmark to apply to all new packages. Otherwise, select each unit of measure for each individual package below.

Item 4: Package Date

If each new package has the same package date, then input the package date and select the green checkmark to apply to all new packages. Otherwise, select each package date individually for each package below.

Item 5: Production Batch checkbox

If all of the new packages will be production batches, select the check box and then select the green checkmark to apply to all new packages. Otherwise, select the production batch box individually for any package that will be production batches, if any.

Item 6: Quantity

If each new package will have the same quantity, then enter the new quantity and select the green checkmark to apply to all new packages. Otherwise, input each new package quantity individually below.

Item 7: Existing Package

If each new package will be pulling from the same source contents package, input the source package and select the green checkmark to apply to all new packages' contents section.

Item 8: Quantity

If each new package will be pulling the same quantity from the source package, then input the quantity and select the green checkmark to apply to all new packages' contents section. Otherwise, individually input the quantity each new package is pulling from its source below.

Item 9: Package #1

Package #1 is used to input the source package that is being used to create the new package.

Item 10: New Package ID

New Package ID is used to select the package tag number for the new package.

Item 11: Create Packages

Once the new packages are created, select the Create Packages button to complete the transaction.

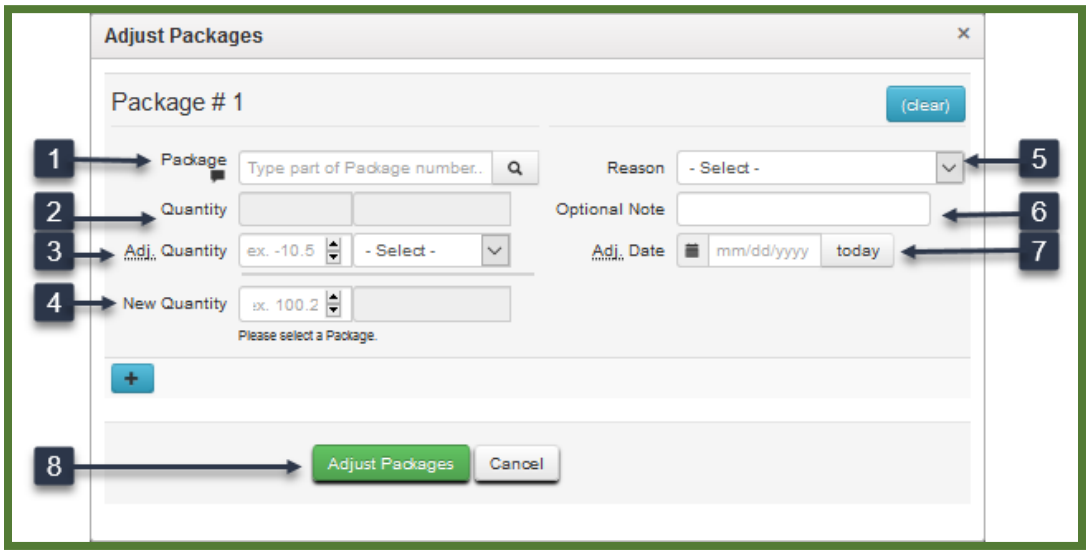
Remember:

- Unless you are a processor combining multiple products to process together, you cannot combine products of more than one item/category into a single package.

- All products must be strain and item specific when packaging and transferring/manifesting.
- The first package from a Harvest Batch is created from the Harvested Tab under the Plants area.

Adjust / Discontinue Package

Adjustments to a package are available when something has occurred to a package that causes the package to be in a state that conflicts with what has been recorded in Metrc. A package should not be adjusted for sales or re-packaging reasons. The reasons for packages adjustments were created by the State and cannot be changed or altered without the guidance of the State.



Item 1: Package ID Number

This is the field where you will input the package being adjusted.

Item 2: Quantity

The Quantity Field will display the current quantity of the package.

Item 3: Adjustment Quantity

The Adjustment Quantity field is where you will input the amount that the package is being adjusted by. If you are adjusting down, you will insert a (-) negative sign in front of the quantity.

Item 4: New Quantity

New Quantity will display what the new quantity of the package will be after the adjustment.

Item 5: Adjustment Reason

From the drop down, menu Select the reason for the package adjustment. Please see your State Supplemental for package adjustments/action reasons.

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Item 6: Note

Use the notes section to explain why the adjustment is being made in more detail. There is a limit of 250 characters for the note.

Item 7: Adjust Date

The Adjust Date button will indicate the date the package was adjusted. You can select the today button or enter manually.

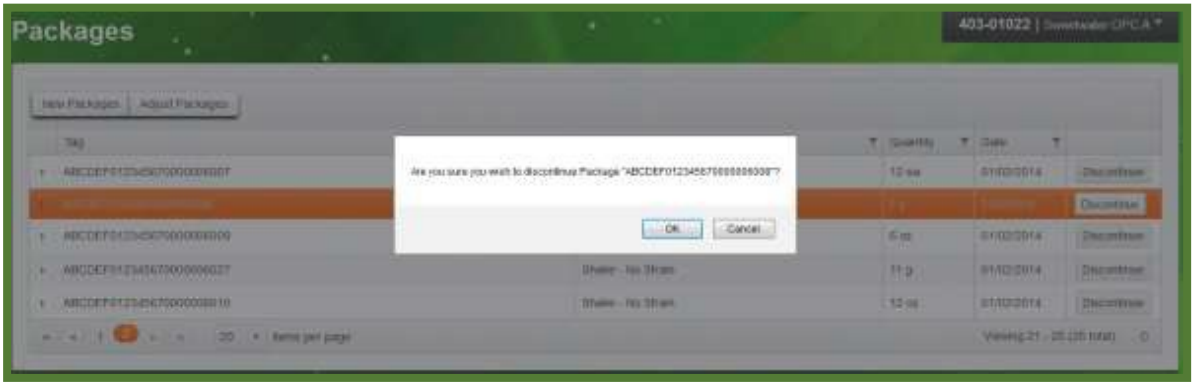
Item 8: Adjust Packages

Select adjust packages to record an adjustment to a package.

Remember

- Discontinuing a package will eliminate it permanently. Discontinued package tags cannot be un-discontinued as a finished package can be unfinished.
- A package can be adjusted in the receive transfer area as well. See receive transfer for more details.
- Adjusting a package is only meant to adjust a package that has an error, not for use to reconcile inventory or your POS system.

Discontinuing a package will clear the package and it will disappear from the user screen. You may use the discontinue package feature when you need or want to permanently eliminate a package. You cannot use this option if you have recorded any transaction out of the package such as a sale, transferred the package or made an adjustment. You will be prompted one final time before the package has been discontinued. See image below.

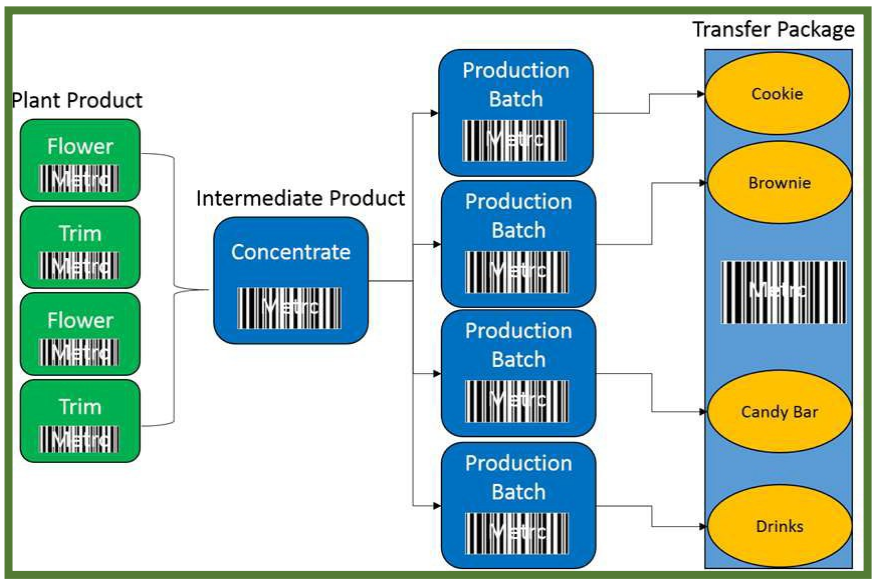


Processor Packages Notes

The following information may be helpful to some Infused Products Manufacturer's. Metrc is providing this as assistance for use as functionality that may prove helpful for Lot or Batch tracking in Metrc. It is required that the chain of custody exist between the marijuana product and final infused product through to the final sale. This chain of custody must be visible through the Metrc system.

For incoming packages used by a Processor, in an intermediate step such as making concentrate to be used in multiple infused product batches, create a new package for the concentrate. The new packaged concentrate may then be partially used in an infused product, making it more easily recorded as content to the finished infused product package.

The Processor process is similar to a harvest batch only a bit more complex. In the typical plant harvesting process, the Harvest Batch exists as one intermediate step in between the package and sellable product. In the case of a Processor we may have multiple intermediate steps.
Please see graphic below.



In this graphic you can see how several bags of Flower and Trim were transferred into the Processor from another location via the transfer process. The shake was then converted to an intermediate product (Production Batch of Concentrate) for use in a larger batch. In the example above, we could call it butter. The butter then is used to bake a large batch of cookies say, 1000. The larger batch of 1000 cookies is then broken down and packaged with other products to be transferred and shipped. Using this example, it is critical to understand that each intermediate step requires a new package tag. If you follow the process above, you can see how each tag ID is connected to each tag ID that preceded it and how the “chain” is kept intact.

Accomplishing this task is done by using the packaging function in Metrc. Selecting the package function will bring up the new package form. Creating the new package will provide the chain of custody. You may use the blue plus sign (contents) button to add multiple source packages being combined into the new package.

If we use the example of a cookie as discussed above we would have many ingredients, oil, flower, water, sugar etc. With this in mind it is important to understand the Metrc system is only designed to track one of these components, the Marijuana. This process can be repeated multiple times to allow for as many multiple intermediate steps as required accounting for the Processor's process. Because Metrc only tracks the one component, the ID numbers attached to the batch of cookies and the concentrate (in the use case above butter) that made up the batch will chart the chain of custody. In this way the Metrc system accounts for the entire chain of custody from seed to sale for the marijuana component of the finished product.

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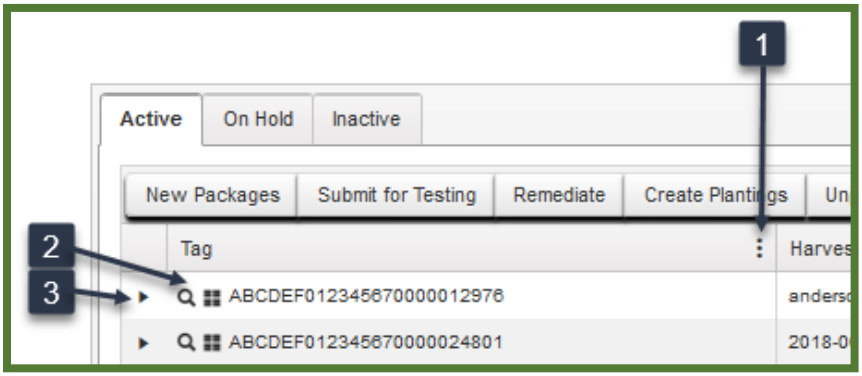
Item Detail

The item detail area of Metrc provides extensive detail about a specific item, be it a package, transfer or plant. Because Metrc is a chain of custody system, each transaction that occurs regarding an item with an ID number has a record along with the characteristics of the transaction. Information included in a package event store can include the harvest batch the package came from, the person who created the package, any edits or adjustments to the package and the transfer history of the package. It is for this reason that anyone with Metrc access should not allow anyone to perform any data entry tasks under their profile.

The screen below shows a typical series of transactions for a package.



Item 1: Column Settings

The Column Settings button will allow you to sort Ascending/Descending, change your view of the columns, and filter for certain information in that column.

Item 2: Tool Bar

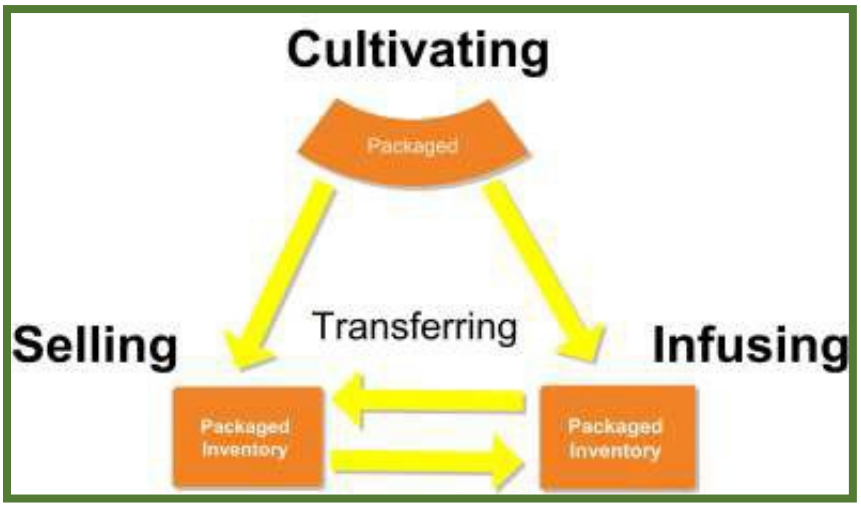
The tool bar across the top of the Drill Down Feature allows the user to identify the different attributes for viewing of the particular item being shown. By clicking at the top of any column the information is sorted in numeric or alphabetical order in ascending or descending order.

Item 3: Drill Down-Caret

The down-caret next to a plant or package tag will open up to show additional details about the particular ID number. Selecting the down-caret once will open it and selecting the down-caret a second time will close it.

Transfers - Keep in Mind

The Transferring of a package is a key component in the chain of custody in the Metrc system. The graphic below shows the transferring process between the different types of facilities and how products move within Metrc.



Important Note: The Metrc system is a tool used by the industry and monitored by the State. Metrc does not define or supersede any rule or regulation. A licensee should always verify a transfer is in compliance with all applicable rules and regulations put forth by the State before completing a transfer.

There are several important points to keep in mind:

- Any movement from one facility license to another requires a transfer and a corresponding manifest generated by Metrc.
- A package must exist in order for it to be selected for transfer.
- A transfer must be created anytime a package moves from one physical location or facility license to another.
- A transfer manifest is still required even if the two facilities are located in the same building. So, if you have a grow and a store operating the business, when you transfer a package it still requires the transfer manifest. This is how the chain of custody is maintained.
- Transfers are real-time inventory dependent.
- A package must be received completely; the system does not allow for partial package receipt.
- A transfer can be rejected by package or completely.
- A rejected package will require the originating Licensee to receive the package back into their custody.
- If you receive a package you will have the opportunity of reporting a new weight. The only reason a new weight should be entered when receiving is due to Scale Variance, or if you are converting the package (i.e. a package is manifested in pounds, and you want to receive it as grams, then you can make the conversion and enter the received quantity as grams).
    - Note: a new weight will raise an exception in the State reporting.
- If you have any questions at all about the transfer; you should reject it.

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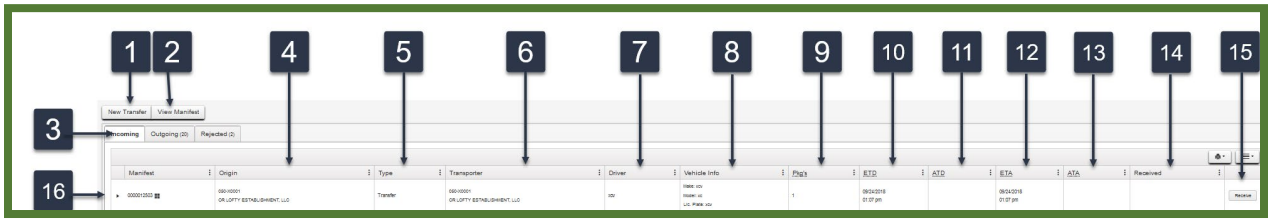
Transfers



Item 1: New Transfer

Selecting the New Transfer Button will launch the transfer manifest screen, so a user can create a new transfer manifest form.

Item 2: View Manifest

The View Manifest field will allow you to look at any existing manifest. You must first highlight the manifest you want to see. It will take a moment to load as the new manifest is created in PDF format. This is where you will be able to print your Manifest.

Item 3: Manifest View Tabs

You have three tabbed choices to view, incoming, outgoing and rejected. Keep in mind that you will only see the manifests for the location you are in.

Item 4: Origin

The Origin field shows you the location the transfer was created in along with the other corresponding information.

Item 5: Type

Type will show you what type of transfer it is.

Item 6: Transporter

Transporter will show you the license number of the facility transporting the product.

Item 7: Driver

The Driver Name field shows the name of the driver assigned to complete the transfer along with the other corresponding information.

Item 8: Vehicle Information

The Vehicle Information field shows the vehicle assigned to perform the delivery along with the other corresponding information.

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Item 9: Packages

The Packages field shows the number of packages being moved in that transfer along with the other corresponding information.

Item 10: Estimated Time of Departure

The Estimated Departure field shows the time the transfer is supposed to leave the point of origin entered into the transfer manifest for that particular transfer along with the other corresponding information.

Item 11: Actual Time of Departure

Actual Time of Departure shows the time the transfer actually left the point of origin.

Item 12: Estimated Time of Arrival

The Estimated Arrival field shows the time the transfer is supposed to arrive at the destination entered into the transfer manifest for that particular transfer along with the other corresponding information.

Item 13: Actual Time of Arrival

Actual Time of Arrival shows the time the transfer actually arrived at the destination.

Item 14: Received

The Received button shows the time the recipient of the transfer selected the receive button in Metrc. This may or may not actually correspond to the drop off time. It is important for the receiving licensee to select the receive button as soon as they have received the product to avoid discrepancies.

Item 15: Receive button

The Receive button is what you select when you are ready to receive/reject the manifest.

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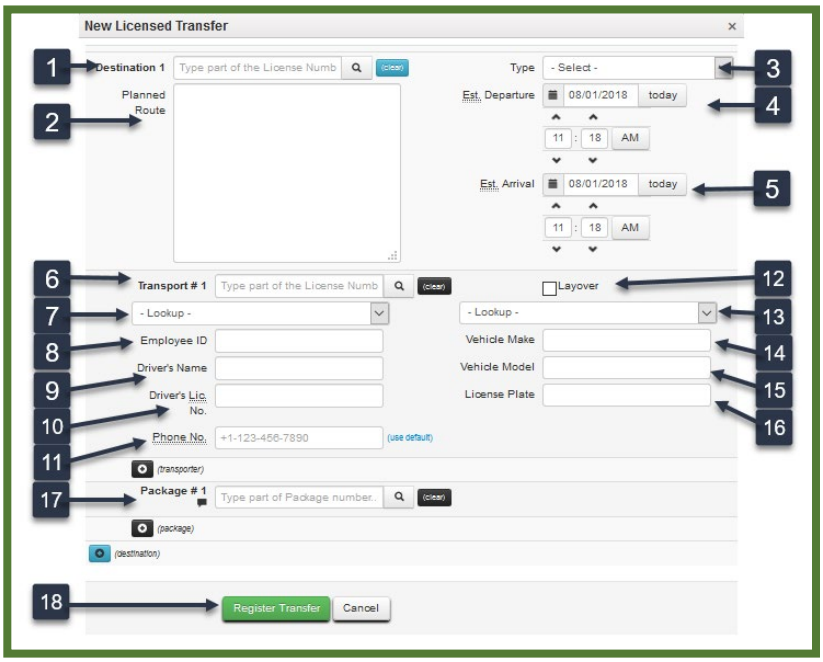
Creating a Transfer

All information entered into the manifest fields are required and can be saved and printed in PDF format. You can save a copy of the manifest for your records if you choose but it is not required. You will also need to print a copy for the driver. Please be sure you read all of the rules and regulations regarding transferring and transfer manifests provided by the State to ensure your transfer is in compliance. Please see your State Supplemental for any extra boxes, dropdowns or choices that your State may have added to the transfer manifest page.



Item 1: Destination 1

The Destination box is used to enter or select the location you will be shipping to. You can input the location's license number or business name, or you can select the magnifying glass to bring up the list of facilities available to manifest product to. All actively licensed businesses are located in this list. The menu is sorted in numerical order by license number.

Item 2: Planned Route

The planed route field is used for each specific leg of a transfer. If the transfer is going from one location to another, only one route will need to be entered. If the transfer is a multipoint transfer, a field for each leg of the transfer will need to be completed. The field shown will only be for the individual leg of the transfer.

Item 3: Transfer Type Drop Down

The Transfer Type Drop Down specifies the kind of transfer you are performing. Please see your State Supplemental for details on your transfer types. Please see your State's rules and regulations as to the type of transfers that are allowed for your license type.

Item 4: Estimated Time of Departure

Use Estimated Time of Departure to provide the date and time of day the product is leaving the facility.

Item 5: Estimated Time of Arrival

Use Estimated Time of Arrival to provide the date and time of day the product is arriving at the destination.

Item 6: Transport #1

Use Transport #1 to input the license number of the facility that will be transporting the product. If it is your own facility transporting the product, enter your facility license number.

Item 7: Driver Lookup Drop Down

The Lookup Drop Down will provide the user with a list of drivers that have been previously entered into Metrc. Every time a driver is entered for the first time the information associated with that driver will be added for future use. The driver information includes Badge number/Handler's Permit or Username, Driver's Name, and Driver's Lic. No. but is not associated to the vehicle.

Item 8: Employee ID

Enter the username of the employee transporting the product.

Item 9: Driver’s Name

Enter the first and last name of the employee transporting the product.

Item 10: Driver’s License Number

Enter the drivers license number of the employee transporting the product.

Item 11: Phone Number

Enter the best phone number for any questions related to the manifest.

Item 12: Layover checkbox

Check the layover checkbox if there will be a layover between the origin license and the destination.

Item 13: Vehicle Lookup Drop Down

The Vehicle Lookup Drop Down will provide the user with a list of vehicles that have been

previously entered into Metrc. Every time a vehicle is entered for the first time the information associated with that vehicle will be added for future use. The vehicle information is not associated to the driver.

Item 14: Vehicle Make

Enter the make of the vehicle transporting the product.

Item 15: Vehicle Model

Enter the model of the vehicle transporting the product.

Item 16: License Plate

Enter the license plate number of the vehicle transporting the product.

Item 17: Package #1

The Package field allows you to either input the tag number being transported or select the magnifying glass to see a list of all available packages at your facility to be transported. If you have previously selected the package and then selected New Transfer, the package tag number will be populated here already.

Item 18: Register Transfer

The Register Transfer Button will finalize the manifest creation process and make the manifest available to all parties named in the transfer.

You make use the add (package) button to add additional packages to the manifest. A user should only add packages to that manifest for the particular destination they are traveling too. If you have multiple destinations a user should add the packages for each destination under that destination and not all packages under one destination. A user can add as many packages for that destination as required.

You may use the add (destination) button to add an additional destination. When a new destination is added, new fields will be shown for the user to complete. The new fields will include destination, route, schedule and package. The user will not need to adjust or change the driver or vehicle information.

After a transfer has been registered it will be viewable by the licensee who created it as outgoing, by the company receiving it as incoming and by the State. Transfers can be scheduled in advance for as many facilities as desired and for as many packages as needed as long as the transfer meets regulations.

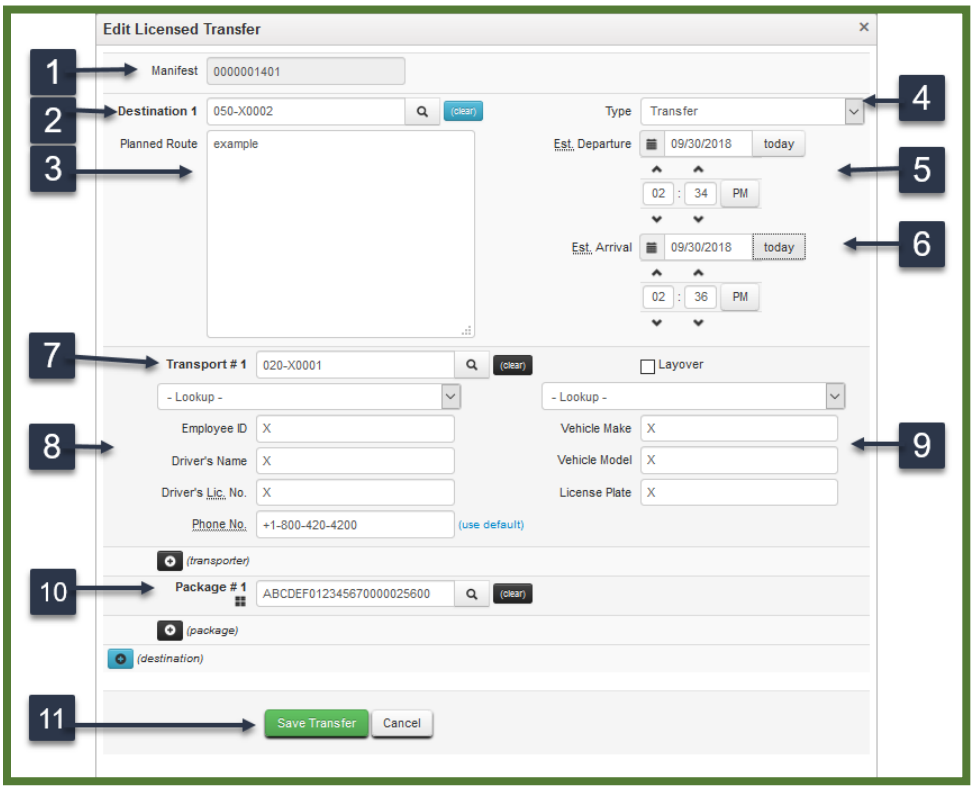
Remember:

- A transfer cannot be generated for a package that has not been created. Only live packages can be added to a transfer manifest and shipped.
- The packages for delivery should correspond to the destination they are assigned to.

- Metrc is a reporting system. All transfers should be completed based on all applicable rules and regulations put forth by the State. Metrc does not replace, alter or change any rule or regulation. If you have questions about how you should be manifesting product, please refer to the State.

Modifying or Voiding Transfer

A transfer can be changed, modified or voided any time a licensee chooses to do so, up until the time it leaves the facility. Once the transfer process has begun the transfer may not be modified. The product being transferred will remain the responsibility of the business that originated the transfer and will not be entered into the recipient's possession until the receive button is selected by the recipient. You may edit each of the transfer fields in the Metrc transfer to the same level of detail as when the transfer was created. Edits may be completed for a variety of reasons including: Error correction, Changes in destination, Changes in product, etc. The Voiding of a transfer will permanently eliminate the transfer and move the product back into the originators inventory. The transfer process is a key component of the chain of custody and modification to a transfer manifest should be handled accordingly. The edit button is visible to the very right of the manifest line, as well as the void button.



Item 1: Manifest

This will display the manifest number of the manifest

Item 2: Destination

The Destination of a transfer can be changed. In the Destination area, select a new location and a new planed route. Remember the destinations in the pull-down menu are listed in numerical order by business license number. If an additional destination needs to be added to the manifest, you can use the blue plus (destination) button to add any additional destinations.

Item 3: Planned Route

The Planned Route can be modified if the original route is incorrect or no longer possible.

Item 4: Transfer Type

The Transfer type can be modified if the original information was entered incorrectly or if the package is being redirected for a new purpose.

Item 5: Estimated Time of Departure

Estimated Time of Departure can be adjusted if the transfer has been delayed or moved to an alternate departure date and/or time of day.

Item 6: Estimated Time of Arrival

Estimated Time of Arrival can be adjusted if the transfer has been delayed or moved to an alternate departure date and/or time of day.

Item 7: Transporter Field

The Transporter license can be modified if the original transporter entered is incorrect or has been changed.

Item 8: Driver Information

Driver information can be changed if the initial driver information is incorrect or has changed.

Item 9: Vehicle Information

Vehicle Information can be changed if the initial vehicle information is incorrect or has changed.

Item 10: Package Field

The package field can be used to change the package. If you need to add a package you can select the black Add (plus) button and a new field will appear to add an additional package. You can add any package to the manifest required. Removing the package from the transfer will put the package back into the transfer originators inventory.

Item 11: Save Transfer

Once you have completed the modifications, select the Save Transfer button to finalize the transfer.

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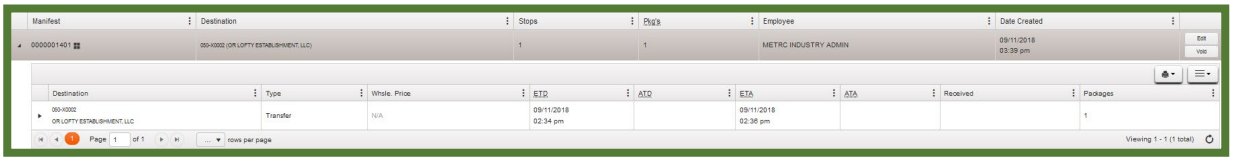
Remember

- New packages can be added, or packages may be removed. However, even though you can add or remove packages you cannot adjust the package from the transfer screen. If a package needs to be adjusted, you will need to remove the package from the transfer to make the adjustment. If you want to add the package back to the transfer, you may do so after it has been adjusted.
- You can select the Drop-Down Menu Arrow to review all of the information about that manifest (see graphic below).



Voiding A Transfer

Voiding a Transfer can only be completed by the originating business. To Void the transfer the user will need to navigate to the outgoing tab on the transfers screen. Simply locate the void button associated with the proper transfer and select the Void button (see the graphic below).

When you have selected the Void button, you will receive a prompt asking you to confirm your decision. Simply select the OK button to confirm.

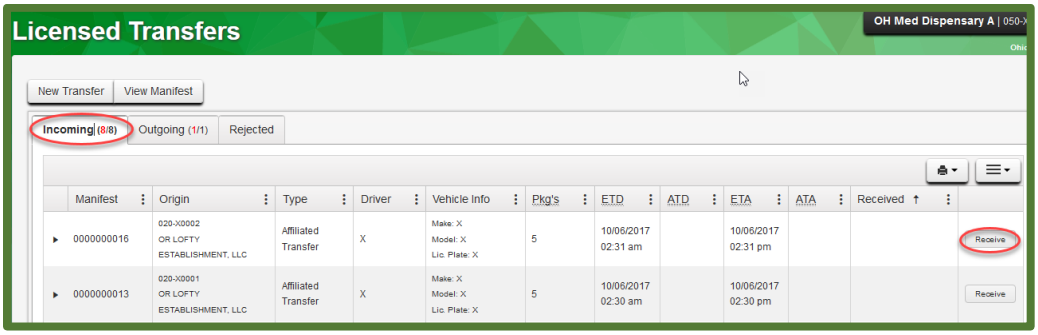
Once a transfer has been voided it cannot be reinstated and all of the associated packages will be returned to the transfer originators inventory.

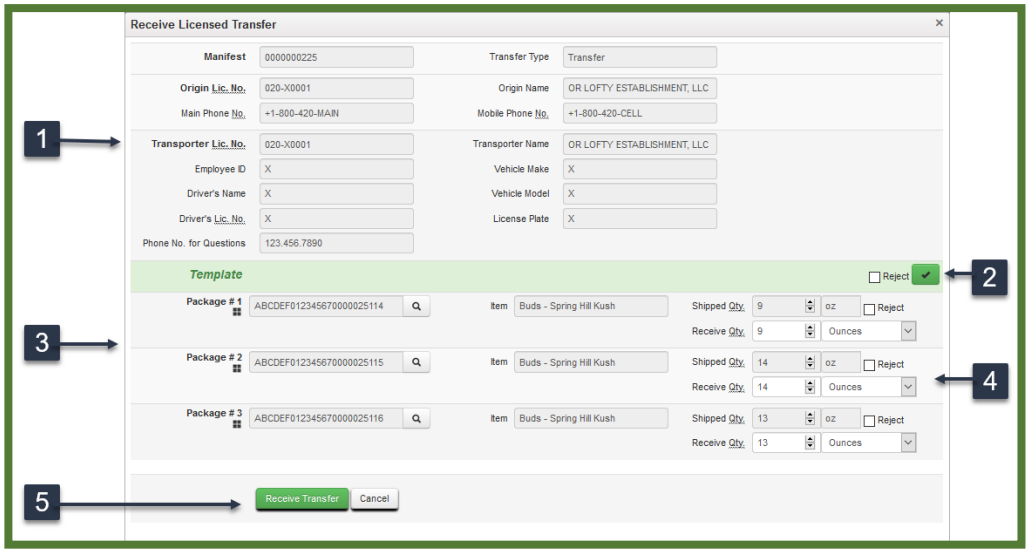
Receiving a Transfer

Receiving a Transfer is the exchange in the chain of custody. Once the recipient has selected the receive button, that business has accepted the package and thus taken responsibility for it. Incoming transfers can come from your facility or any company you do business with. You have two options with incoming transfers: Receive or Reject.

By selecting the Drop-Down Menu Arrow to the left of the transfer Manifest ID number, you can see and review the contents of the shipment prior to taking receipt of the packages.

On the right-hand side of the transfer manifest you can select the receive button. Selecting the receive button will not accept the transfer but instead will launch the editable receive transfer screen.





Item 1: Manifest Information

This will display the manifest information that cannot be edited by the receiving facility.

Item 2: Reject check box Template

If all packages are being rejected, you can select the Reject checkbox and select the green checkmark to apply that checkbox to all packages.

Item 3: Package Information

This will show the package ID number and contents of the package. This should be verified prior to receiving into Metrc.

Item 4: Shipped/Received Quantity

The Shipped Quantity will show the amount of the product that was recorded when the package was created. Metrc will automatically populate the same product quantity in the Receive Quantity field as the package had when it was created.

If the Shipped Quantity does not match the Received Quantity, the recipient has two choices:

- Input a different value only if there is scale variance, or the receiver wishes to convert the product to a different unit of measurement (i.e. the origin facility manifested the package as pounds and the receiver wishes to do the conversion and receive as grams.
- Reject the package.

If the user accepts the package, the adjustment will show in Metrc.

There is also a reject checkbox located here. A single package can be rejected from a transfer without having to reject the entire transfer. Simply check the reject package box next to the corresponding package. When you reject a package the received quantity and unit of measure will disappear and a Reject Reason drop down, as well as a Notes section, will appear to input why the transfer is being rejected.

Item 5: Receive Transfer button

Selecting the receive transfer button will accept/reject the transfer and move the packages into the recipient's inventory, and/or reject the packages back to the origin facility.

Any package not check marked will be received. At that point you can accept the transfer and the rejected package(s) will remain in the custody of the sender.

The sending facility will then see the rejected packages appear under the Rejected Tab. The sending facility will click the Receive button, input the Reject reason and use the notes section to explain why it was rejected.

Remember

- Once the recipient has selected the receive button, they are responsible for the package and its contents in whatever condition it may be in.
- It is in the best interest of the recipient to verify the contents of the package before receiving the package in Metrc.
- There is not a "Reject Transfer" button, transfers are rejected by package.
- Make sure you are in compliance with all of the applicable rules and regulations set forth by the State.

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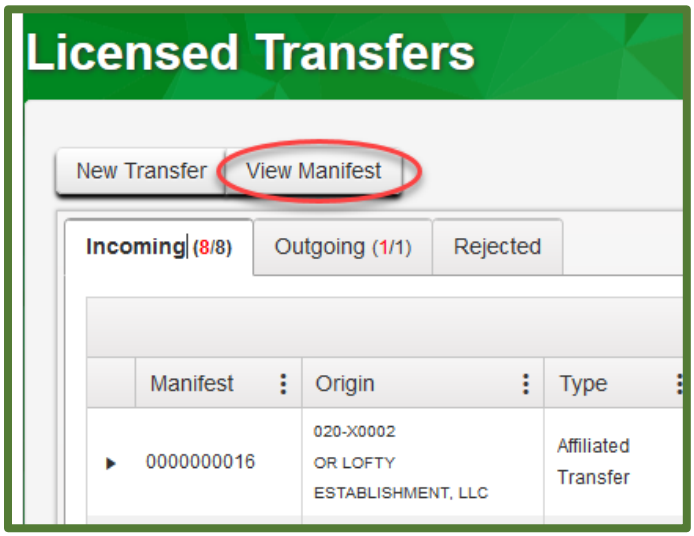
View a Manifest

A manifest can be viewed by selecting the View Manifest Button. The view Manifest button is available in incoming, outgoing and rejected screens. You will need to select the manifest before you select the View Manifest Button. You can see all of the details of the manifest without having to view it by selecting the Crop Down Arrow Button next to the corresponding manifest number.



Once you have highlighted the appropriate Manifest and selected the View Manifest Button, a new tab in your browser will launch and the manifest will open as a PDF file. You will need to allow popups from Metrc to view the 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 #:	**0000001401**	**Date Created:**	**9/11/2018 2:39 PM**
Originating Entity:	OR LOFTY ESTABLISHMENT, LLC		**For Agency Use Only**
Originating License Number:	020-X0001		
Address of Originating Entity:	9079 SE McLoughlin Blvd. Portland, OR 97222-7355		
Phone No. of Originating Entity:	+1-800-420-MAIN		

Destination # 1:	OR LOFTY ESTABLISHMENT, LLC	**Destination Phone No.:**	+1-800-420-MAIN
Destination License Number:	050-X0002	**Date and Approximate Time of Departure:**	9/11/2018 2:34 PM
Address of Destination:	9079 SE McLoughlin Blvd. Portland, OR 97222-7355	**Date and Approximate Time of Arrival:**	9/11/2018 2:36 PM
		Date/Time Received:	
Route to be Traveled: turn right out of the facility, travel two miles, turn left, and the dispensary is on the right.		**Notes:** details for extenuating circumstances (e.g., road closure, flat tire, etc.)	
Transporter # 1:	OR LOFTY ESTABLISHMENT, LLC	**Non-layover**	
Transporter License Number:	020-X0001		
Address of Transporter:	9079 SE McLoughlin Blvd. Portland, OR 97222-7355		
Contact Phone No. for Inquiries:		**+1-800-420-4200**	
Name of Person Transporting:	X	**Employee ID of Driver:**	Pending
State Driver's License No.:	X	**Signature of Person Transporting:**	
Make, Model, License Plate No.:	X X X		

Package Details	Harvest Name	Item Name	Weight/Quantity
ABCDEF012345670000025600 Lab Test: NotSubmitted Status: Shipped		Buds - Blue Dream (Buds)	Shp: 10.5000 g

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:			

You can print or save the manifest from the view manifest selection by using your browser print and save buttons. Please remember you will need to print the manifest for the driver before he leaves the facility.

Sales

Sales in Metrc are reported by Package Tag ID. It is important to understand what a package means in Metrc. The package is a serialized unit. That means every package will need to be accounted for in terms of what happens to the contents. The package's primary purpose is to enforce a secure chain of custody. The package is similar in concept to a "Lot". For example, a package can be made up of many smaller sellable units. As each one of the smaller individual units is sold, the individual sale can be recorded or a summarized total for each package may be reported. The association of a serialized package to a sellable item might be a new concept to you and your system. For integrity during the chain of custody, it is necessary to track each uniquely and individually identified package all the way to its final selling event.

To associate your sales to the packages in Metrc, you have three choices to report your sales. You can manually enter your sales into Metrc, you can create or export a CSV file and import that into Metrc, or you can work with your POS System to report via the API. All sales must be recorded in Metrc for all products specified by your state Typically this is all products containing marijuana, however your state may require other products to be recorded as well. Please see your State Supplemental for entering sales into Metrc.

Remember:

- Sales information is only captured when you have selected a store.
- Recording of Sales in Metrc is for "reporting last event in chain of custody"

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Testing

Please see your State Supplemental and rules and regulations for testing within Metrc.

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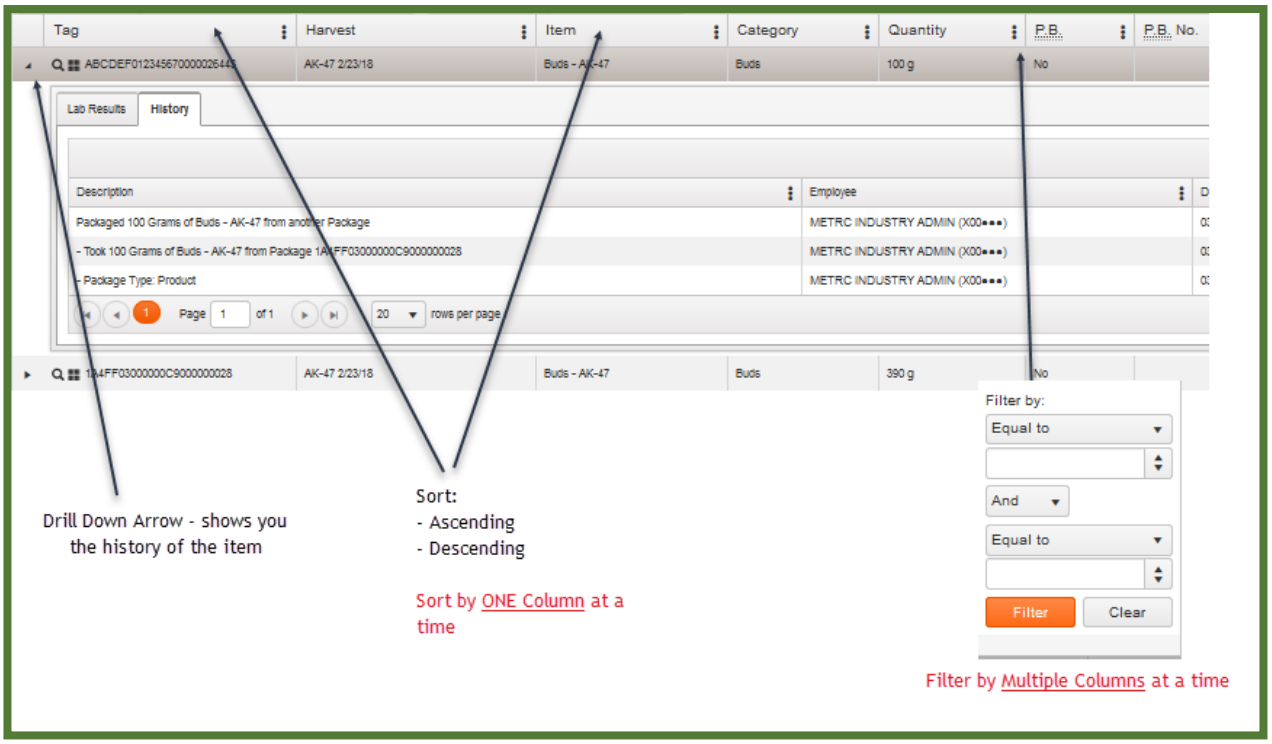
Search Function

The Metrc system contains a significant amount of data requiring robust search capability. Metrc has developed a search application that provides the ability to search in multiple ways with many variables and minimal data. The following instructions will show you several examples of how to use the search features.

By selecting the header of a column in the table you are in, you can change the view from ascending to descending order or vice versa. Each column has the ability to change the view from ascending to descending by selecting the column.

This filter feature allows you to search within each of the individual columns by variables that you indicate. Simply click on the 3 dots to the right of the column header and the search box will open.



Once you have entered the information into the fields, select the "Filter" button to start the query. The "Clear" button is used to remove mistyped information or to remove information before a new search is started. You can use one search field to search or both to refine to a greater level of detail.

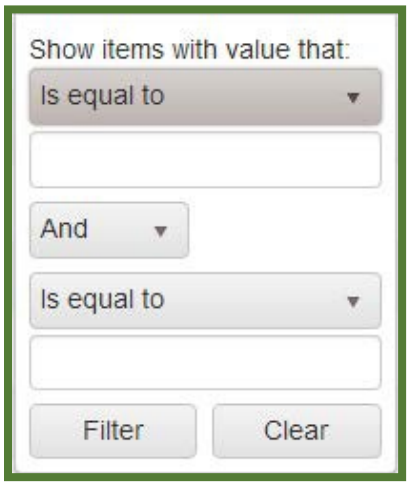
The variable menus allow you to search by the following parameters:

- **"Is equal to"** - If you know the exact name, number, or term you are looking for.
- **"Is not equal to"** - If you want to capture multiple items excluding one or more pieces of data. For example, if you want to search for all business licenses except one facility you would type in the exact facility you do not want to see.
- **"Starts with"** - This feature allows you to search by partial information. If you know the first few letters or numbers of what it is you are looking for.

- **"Contains"** - This feature allows you to search by partial information. If you know some portion of the name or number you are looking for.
- **"Does not contain"** - If you want to capture multiple items excluding one or more pieces of data. You can exclude certain portions of names or numbers.
- **"Ends with"**. - This feature allows you to search by partial information. If you know the last few letters or numbers of what it is you are looking for.
- **"And / Or"** - This allows you to add multiple variables to the search parameters to further refine your search.

Example 1: A tag number using the upper search field:

- If you know the exact tag number - Search with **"Is equal to"**.
- If you know the first 3 digits of the tag number - Searching by **"Starts with"**.
- If you know the last two digits of the tag number - Searching by **"Ends with"**.
- If you know it has a particular set of numbers - Search with **"Contains"**.
- The search functions do not allow for the use of wild cards.



Example 2: A tag number using the "And / Or" option:

- Each feature allows you to search single or multiple values.
- If you know the first 3 digits of a tag number and the last 2 digits of the tag number, you would enter those into the first parameter and the second parameter choosing the **"And"** button.
- If you wanted to see all transfers in a particular month you would put the month in the first parameter and the year in the second parameter while selecting the **"And"** button.

Example 3: A phone number e-mail or Transfer:

This search option is the same as search parameter one. This field allows you to search by:

"Is equal to", "Is not equal to", "Start with", "Contains", "Does not contain" and "Ends with".

- Phone number - if you know the area code and the last 4 digits of the phone number - Searching by "starts with", "and", "is "equal to".
- E-mail - if you know the company name - Searching by "contains".
- Transfer Date - if you know what date transfers were initiated - Search with "is equal to".

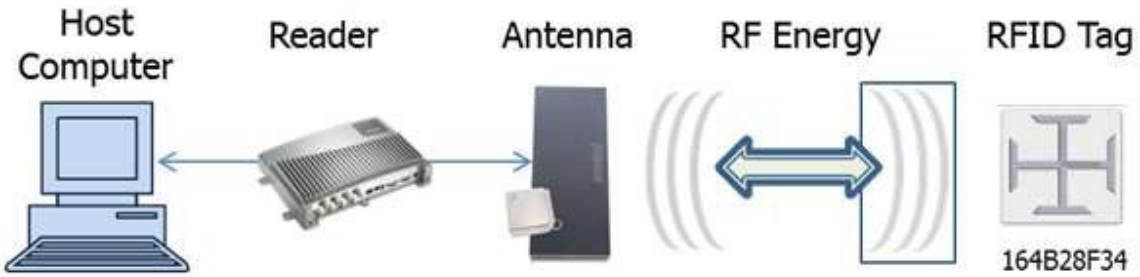
Please remember to always clear your search fields before beginning a new search and also to make sure you are in the correct field you are looking to search for information in.

RFID

Radio Frequency Identification (RFID) is a technology that utilizes a tag with a “silicon chip” often referred to as a “transponder” that enables the automatic remote reading, writing and identification of objects that have been “tagged” with the RFID transponders. RFID tags or transponders send out information to a reader or "interrogator." The RFID tag contains the silicon chip and an antenna enabling it to receive and respond to radio frequency queries from the RFID interrogator. The tags are small and can easily be attached to or incorporated into a product or device. Passive RFID transponders use the energy from the interrogator to power on the tag and send the return signal back to the interrogator that originated the query. Passive tags usually contain small amounts of information in the range of 96 to 512 bits of information. Active RFID tags use small batteries to assist them in responding to the queries of an interrogator. This allows them to carry significantly more data and send and receive that information over much larger areas as well.

RFID tags are often seen as a replacement for barcodes with significant advantages over traditional bar-coding technologies. The data capacity of an RFID tag is large enough to allow each tag to have its own unique code. Current bar codes are limited to a single type code for all instances of a particular product. With an RFID tag a product can be individually tracked as it moves from location to location through a process, or through the supply chain. RFID tags can also segment certain areas of information. This allows a user to “lock” certain areas of information while rewriting other areas if they so choose.

RFID Reader generates a radio signal and broadcasts via its connected antennas configured in an RF field. A tag passes through the RF field and receives the corresponding radio signal. Radio signal is received by tag’s onboard antenna. The tag’s chip is energized and releases its preprogrammed data. A portion of the radio signal is modulated and reflected back to the reader. The reader decodes reflected signal, passes data on to the data aggregation device and subsequently on to the host system.



Scanning

RFID - Passive RFID offers a range from inches to several feet and does not require line of sight. This means that individual tags placed within a carton, packed in a box and stored on a pallet may be read. You do not have to open each box and present the individual item. The RFID chip can hold a large amount of data as well as monitor the movement of the tagged object — acquiring and delivering new information along the way like a traveling database.

Greater storage capacity, combined with update flexibility, make smart labels ideal for applications such as product tracking through the supply chain, baggage tracking, or asset tracking.

Simultaneous Scanning

RFID - Standards have algorithms to support simultaneous reading of tags at one time.

Reconciling

Because RFID has the ability to read multiple tags at one time and each tag has its own unique ID, we can now reconcile to a much better degree of what is expected vs. what is actual. For example, if we have a stocking location with materials, it can associate all of the items that are at that location. When inventory is taken, we have an expected list of items and the ability to identify the exact pieces of material that are missing and then search for those unique ID'd materials. We can also see materials that are in the wrong location allowing us to relocate them to the right location.

Harsh Environments

Tags may be placed in extreme environments and perform to specification. They are very robust to handling, sensitive to environment, and generally degrade once used, stored or handled in a non-office environment. RFID smart labels can be read and written to through dirt, paint, and many nonmetallic objects.

Dynamic Updates

Tags may be written to and offer on board memory to retain information. This feature may be used to store a product calibration history, preventive maintenance, etc. Updates may be made within the blink of an eye and automatically without human intervention. Once a Bar Code is printed it remains frozen. The Code and the process of attaching the BC is not supportive of real time updates. It is a labor-intensive process to update any information on a BC once printed.

Search

An RFID scanner has the ability to show only the RFID tags that are being searched for. If a tag ID is entered into a hand-held device, the device will read all of the tags, but only notify the operator and display the tag ID that is being searched for only when it is read.

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FAQ's

Question – Who is Metrc and why are they involved?

Answer - Metrc was chosen by the State after researching the complexities associated with growing, harvesting and processing marijuana and marijuana products. The State determined it would be necessary to find an outside vendor capable of developing a program tailored to these specific regulatory needs.

Question - What is Metrc?

Answer - An enforcement tool developed to track and monitor marijuana inventory within the State's regulated, closed loop Medical/Retail Marijuana regulatory scheme. Metrc (Marijuana Enforcement Tracking Reporting and Compliance) is a web-based application that State Licensees upload marijuana inventory data as required by regulation.

Question - What are the requirements to access the Metrc software?

Answer - Only State licensees (Owners of businesses that hold a State issued Medical or Retail Marijuana business license) will be provided access to the Metrc system. As Metrc is a web-based application, industry members may access the system via any device that allows them to sign-in to the secure Metrc web site via the internet.

Question - What computer requirements are there for accessing Metrc?

Answer - Metrc is a cloud-based solution and only requires internet access. Any PC, laptop or tablet device with internet access will work with Metrc.

Question - What is the URL address to access the software?

Answer - https://___.metrc.com, your state abbreviation will go in the blank.

Question - What is my user name?

Answer - The user name required by your state, be it a badge, handler's permit, your individual identification number, etc.

Question - When I login it says, "I can no longer use this key."

Answer - This means the user is trying to login with their welcome email hyperlink. They need to open a new browser window. Type in the URL address: . Then type in their user name and password they set up in their original email. Remember initial login credential emails are only good for 24 hours.

Question - Do I need a bar code scanner, RFID device or other hardware?

Answer - No, Metrc was developed specifically so no additional hardware (Bar-Code or RFID) would be needed to work or perform any functional tasks in Metrc. The only hardware needed to operate in Metrc is a mouse. Remember you never have to enter the ID numbers in Metrc. The ID numbers are assigned by Metrc when tags are ordered and will show up in your database automatically. Changing phase, changing rooms and all of the other functions using the ID numbers can be done simply by using a mouse click while in the system. No printer is necessary. Plant and package tags come printed and encoded by Metrc prior to receipt by the licensee. It is not possible to enter a tag ID number into Metrc.

Question – Does Metrc contain patient information?

Answer - There is no patient information contained in Metrc. The patient number is only stored as a reference to the number of plants a business is allowed to grow. These registry numbers and their associated physician recommended plant allowance is the number of plants each Center is allowed to cultivate. Please see your State's rules and regulations as to whether patients are required in Metrc.

Question - How are RFID Tags Used with Metrc?

Answer - There are two types of RFID tags that will be used to monitor marijuana inventory; the first is a plant tag that attaches to a security strap that can be used as a plant stake when the plant is in its early growth stage and then as a looped strap once the plant has reached a size that will support the tag; the other is a package tag that is affixed to a package of processed Marijuana or Marijuana product. However, each time a new RFID tag is used it contains information regarding all plants and/or products that are associated with the marijuana or product to which the new tag is attached. This allows the State to track marijuana back to the original plant should a health or safety concern arise.

Question - Do Industry Members have to enter a 24-digit code into Metrc for every plant it grows and every package they generate?

Answer - No, that is one of the benefits of having Metrc provide the tags; once a specific licensee orders RFID tags, those tags are specifically provisioned for that licensee and each tag's 24-digit code is placed in the licensee Metrc account for both plant and package tags. Then a licensee can simply access their account and assign tags to plants or package – with a simple "point and click" the user can assign tags in mass or individually.

Question - Do the RFID tags track the marijuana once someone has purchased it?

Answer - No, State tracking ends at the point the marijuana or marijuana product is sold to a private citizen. Metrc does not track any sales information about who has purchased product.

Question - What about when marijuana is transported from Cultivation to a Store or Product Manufacturer?

Answer - Metrc tracks all marijuana from the point at which a plant is placed in a growth medium to the point it is entered into the inventory at a store. The system generates transportation manifests that detail each package being transported and all associated RFID tags.

Metrc Support

- Support Materials (available through the software (24x7x365)
    1. This State Supplemental Guide
    2. Metrc Manual/User Guide
    3. CSV Uploads Guide
    4. Metrc Reports Guide

- Interactive Support Team
    1. Email - **support@metrc.com**
    2. Phone - **877-566-6506**

       Monday - Friday: 8 am – 7 pm Mountain Time
       Saturdays: 8 am – 6 pm Mountain Time
       Sundays: Voicemail & Email Only

- Training - sign up for training through the Metrc website (www.metrc.com) or by navigating to "Sign up for Training" under the Support Tab on the navigation bar in the software.

  To sign up from your Metrc account:

    1. Click on Support in the right-hand options on the navigation bar.
    2. Click on "Sign up for Training".
    3. In the new window, click on the date you'd like to attend a specific training and fill out the registration information.

  To sign up from www.metrc.com:

    1. Click on "Customers" on the navigation bar and select your state.
    2. Click on the green "Training Sign Up" button.
    3. Click on the date you'd like to attend a specific training and fill out the registration information.

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Acronyms & Glossary

- Adjustment - A reported change in the quantity of packaged inventory, requiring a reason, such as water loss.
- Buds - The harvested flower part of the plant.
- Business Licensee - A business licensed by the State to grow, process, and/or sell medical marijuana. A business licensee may conduct business with other business licensees, with vendors, and/or with patients.
- Concentrate - An amount of marijuana, in concentrated form, processed on a given date and having a specified weight. This marijuana inventory may be sold or transferred by weight or processed by weight into a Processor. Prior to transfer, bulk concentrate inventory must be packaged into one or more containers, each having a unique RFID tag.
- Dry Trim - The process or act of trimming harvested plants where the buds are trimmed after the plants have dried.
- Employee - An individual who works for a Business Licensee.
- Flowering - Flowering is the gametophytic or reproductive state of Cannabis in which the plant is in a designated flowering space that is a limited access area monitored by one or more surveillance cameras within a grow facility with a light cycle intended to produce flowers, trichomes and cannabinoids characteristic of medical marijuana. The flowering space shall be clearly identified by signage designated by the MED and all marijuana shall be accounted for as inventory. Flowering plants may only be possessed within a limited access area of a licensed grow facility.
- Harvest - The process or act of cutting down a plant and obtaining the wet weight of the plant before initiating the wet or dry trim process. The harvest process is performed only on plants from the flowering phase. Any number of plants of the same strain may be harvested at the same time in a harvest batch.
- Harvest Batch - A collection of harvested plants of the same strain which were cut at the same time. There may be multiple harvest batches for the same strain on the same day.
- Hash - Marijuana in a concentrated form, processed on a given date, measured by weight. Hash may be packaged and sold.
- Immature Plant Batch - This is a batch of identical immature plants logged into Metrc as a group prior to being moved into the vegetative phase.
- Infused Product - An amount of an infused or non-smokable product, processed on a given date. This inventory will usually be sold by quantity. Prior to transfer, bulk infused inventory must be packaged into one or more containers, each having a unique RFID tag.
- Kief - Refers to the resin glands (or trichomes) of cannabis which may accumulate in containers or be sifted from loose dry cannabis flower with a mesh screen or sieve.

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- Licensee - Any Person licensed or registered pursuant to the State Code.
- Live Plant - A marijuana plant that has not yet been harvested and is in one of the following phases: Immature, Vegetative, or Flowering.
- Metrc Trained Administrator - An Owner or an occupationally licensed employee of a Medical Marijuana Business who has attended and successfully completed Metrc training and who has completed any additional training required by the Division.
- Metrc User - An Owner or an occupationally licensed Marijuana Business employee who is granted Metrc User account access for the purposes of conducting inventory tracking functions in the Metrc system, who has been successfully trained by Metrc Trained Administrator(s) in the proper and lawful use Metrc, and who has completed any additional training required by the Division.
- Patient - An individual who is registered with the State entity and has been recommended medical marijuana by a licensed physician, and who has obtained, or is in the process of, obtaining a Patient Card.
- Package - An amount of marijuana that may be sold, processed or transferred and must be placed into one or more containers, each having a unique RFID tag.
- Production Batch - This is a group of packages created from a production run of infused product.
- Radio Frequency Identification (RFID) - a wireless automatic data capture technology. RFID systems are made up of three components an RFID tag, an antenna and a reading device. An RFID tag contains a silicon chip and that enables it to receive and respond to radio frequency queries from an RFID reading device. RFID tags use the energy from the reader device to power on the tag and send the return signal back to the reading device. Tags usually contain small amounts of information, generally 96 to 512 bits of information. RFID tags can read from short distances of a few inches to longer ranges like 15 feet.
- Shake - The harvested parts of the plant that are not waste.
- Strain - A specific genus grouping of marijuana plants. Strains may be specific to each business.
- Transfer - A transaction in which the custody of the inventory changes to a different Business Licensee, but the ownership of the inventory does not.
- Transportation Manifest - A document containing the details of medical marijuana package(s) transferred between licensed businesses. A digital copy of the manifest will be stored in Metrc.
- Vegetative - Vegetation is the sporophytic state of the Cannabis plant which is a form of asexual reproduction in plants during which plants do not produce resin or flowers and are bulking up to a desired production size for flowering in a designated limited access area monitored by one or more surveillance cameras as provided by rule. The vegetation space shall be clearly identified by signage designated by the MED and all marijuana located in the vegetation space within a limited access area of a grow facility shall be accounted for as inventory. Vegetation may only occur within a limited access area upon the licensed premises of a grow facility. Each vegging plant will be assigned an RFID tag logged into Metrc

- Vegging - A marijuana plant in the vegetative phase not yet flowering.
- Waste – Any unusable material per-harvest, during harvest, or post-harvest, that is going to be discarded or composted.
- Wet Trim - The process or act of processing harvested plants where the buds are trimmed before the plants have dried.
- Wholesale Transfer - A transaction in which both the custody and the ownership of the inventory changes to a different business licensee.

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