OMMP Medical Grow Site

Advanced CTS Reporting Guide

Introduction:

This guide provides instruction for day-to-day tracking in Metrc once a grow site has set-up all beginning inventory. This Advanced Guide expands on the OLCC's "Initial Setup How-to Guide" for medical grow sites in Oregon's Cannabis Tracking System (CTS), Metrc. Medical Grow Site Administrators (GSAs) new to Metrc should first read the Setup How-to Guide.

This guide does not replace and is not a substitute for the Metrc webinar training for GSAs that is required under OHA and OLCC's rules.

This guide will provide guidance on specific topics that GSAs will need to be familiar with as they continue tracking in Metrc. If you have questions about anything presented in this guide, reach out Marijuana.CTS@Oregon.gov and one of our compliance specialists will help you in navigating CTS compliance.

Daily Reconciliation of Data:

Grow Site Administrators are required to comply with the reconciliation with inventory requirements in Rule. Specifically these requirements are:

- All inventory activities must be tracked using CTS
- All on-premises and in-transit marijuana item inventories must be reconciled in CTS by 8:00 AM local time of the next calendar day.

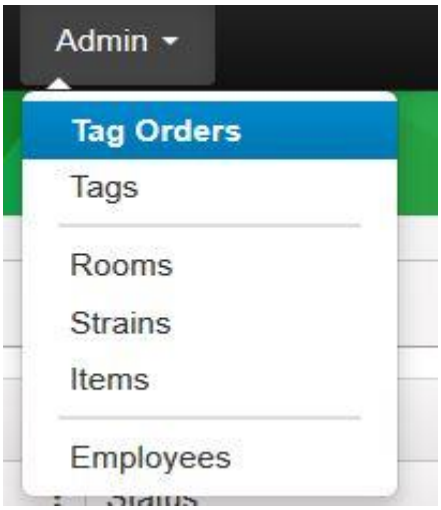
Tags:

You should check to ensure that you have enough plant and package tags in hand for your site. As a reminder, order UID tags through the interface in CTS:

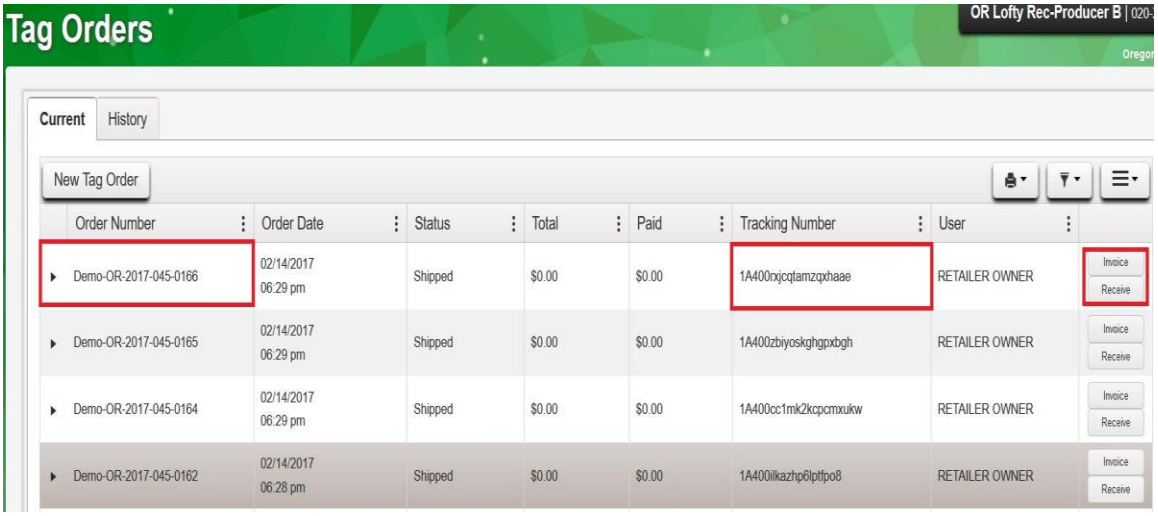
- The UID tag order should include enough plant and package tags to tag all units of usable marijuana. For a grow site, the GSA must also order enough UID plant tags to tag all immature plants over 24 inches and any mature plants.
- Package tags are required to record initial inventory, including plants which will later be assigned plant tags.
- Tags do not expire and it is more cost effective to order more tags per shipment. Plan ahead so that you have sufficient plant and package tags on hand to avoid having to expedite shipping orders.

Tags cannot be assigned in CTS unless they have been marked as received within Metrc. Once a grow site administrator has confirmed tags have been delivered, they must take the following steps:

- In CTS, access the “tag orders” section by selecting Admin> Tag Orders



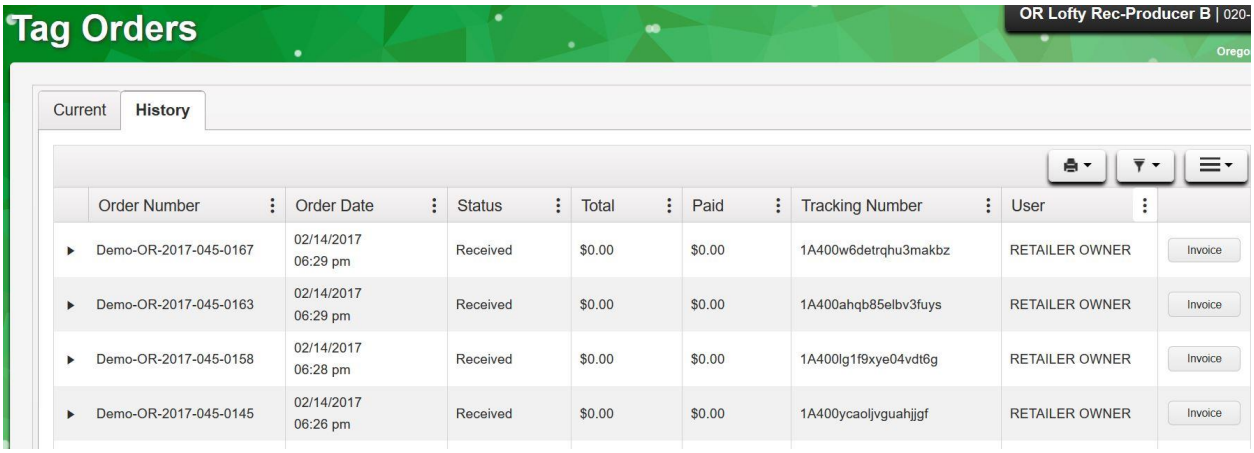
- Find the tag order that was received



- If you have multiple pending orders, compare the tracking number to the shipping information to confirm
    - You can click the black triangle to the left of the order in the display list to see more information
- On the far right side of the tag order in the list, you should see two buttons, “invoice” and “receive”
    - “Invoice” will display a copy of the original invoice for your records
    - “Receive” will mark the order received and will make the associated tags available for assignment
- Click “receive”

- In the dialog box that appears, confirm you wish to receive this order by clicking “OK”

- Your tags are now available for assignment and the received order can be viewed in the “history” tab of the “tag orders” section



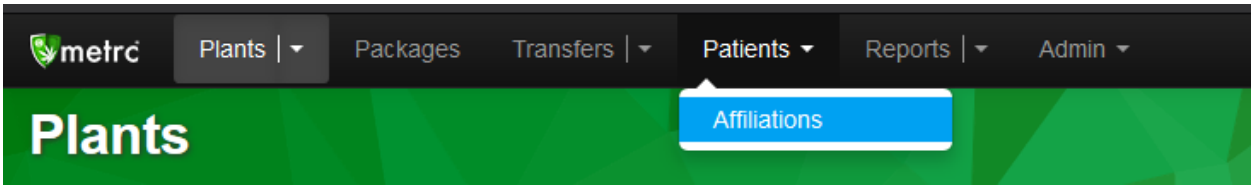
Assigning a UID tag includes both associating the tag with an item in CTS and physically affixing the tag to the marijuana item matching that association in CTS.

Patient Affiliations:

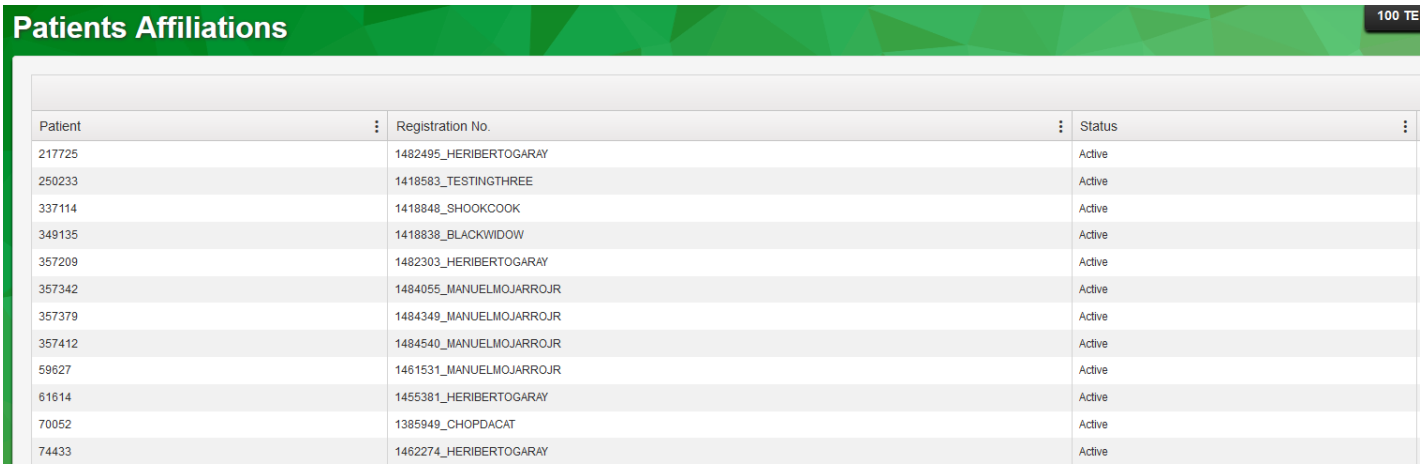
In August of 2019, Metrc functionality was changed to require medical marijuana grow sites to affiliate all new plant batches, plants, harvests and packages with a specific patient that is affiliated with that grow site. These changes were outlined in a joint OMMP-OLCC compliance bulletin, MMCE2019-05. It is important that all GSAs review this bulletin to better understand the patient affiliation functionality.

To check your current patient affiliations:

- Click on “Patients” and “Affiliations”



- You will see a list of patient affiliated with your grow site:



Patient	Registration No.	Status
217725	1482495_HERIBERTOGARAY	Active
250233	1418583_TESTINGTHREE	Active
337114	1418848_SHOOKCOOK	Active
349135	1418838_BLACKWIDOW	Active
357209	1482303_HERIBERTOGARAY	Active
357342	1484055_MANUELMOJARROJR	Active
357379	1484349_MANUELMOJARROJR	Active
357412	1484540_MANUELMOJARROJR	Active
59627	1461531_MANUELMOJARROJR	Active
61614	1455381_HERIBERTOGARAY	Active
70052	1385949_CHOPDACAT	Active
74433	1462274_HERIBERTOGARAY	Active

- The “Patient” column is the Metrc generated patient number in the system
- The “Registration No.” column lists the OMMP card number associated with the patient followed by “_” and then the name of that patient’s grower.
- When affiliating plants, packages or transfers with patients you will need to match OMMP Card numbers with the Metrc patient number in the system.
- If you have issues with your patients not appearing correctly first contact Oregon Health Authority’s Medical Marijuana Program by contacting ommp.info@dhsoha.state.or.us or 971-673-1234. All patient information feeds from OHA to Metrc.

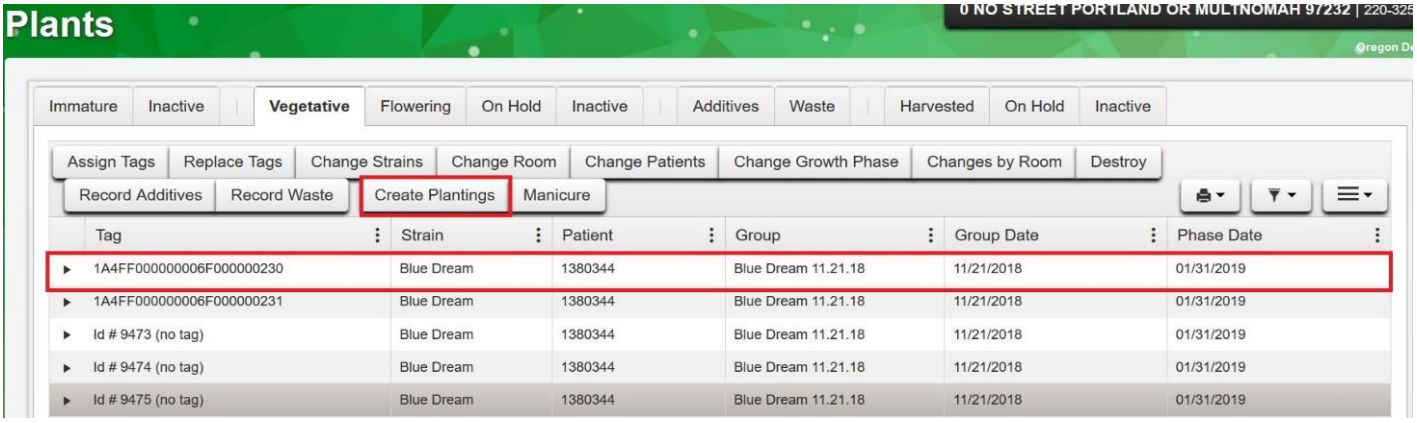
Creating Plantings:

Functionality updates in August of 2019 turned off the ability to create immature plant batches without a source package or source plant (i.e. “from thin air”). This means that all immature plant batches must be created using an existing, tagged plant or from a package tag brought in through an external transfer or a package of seeds created in Metrc from a source plant, package or harvest. Below are two examples of how to properly create your plant batches using existing plants or from a package brought in on an external transfer:

Creating plants from existing plants

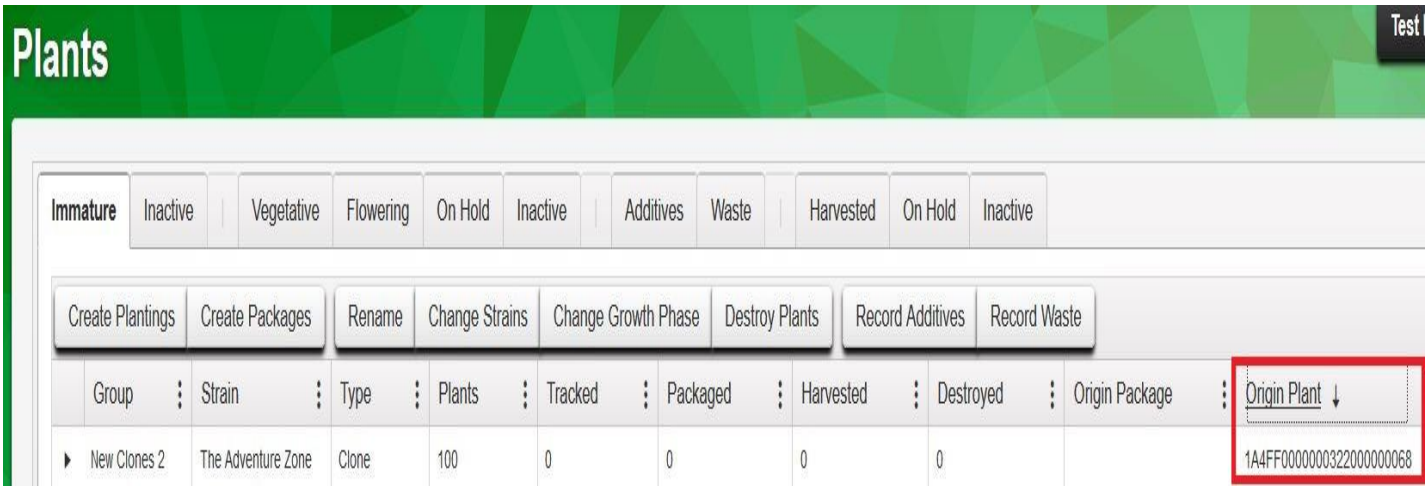
If you are creating clones from a mother plant at your facility you will need to document the taking of those cuttings in CTS. To create plants from an existing plant, you will need a tagged

plant in your flowering or vegetative tab of Metrc:



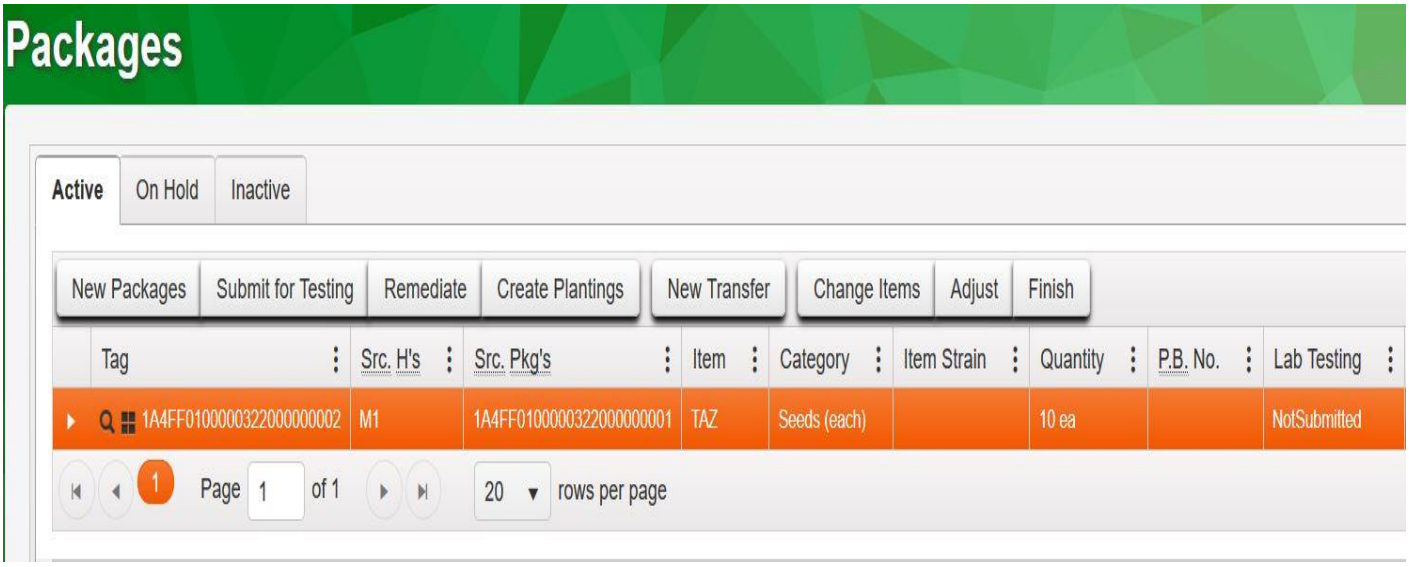
- Click on the plant you took the cuttings from (if you took cuttings from multiple plants for the plant batch, select one of the tagged plants that you cloned from)
- Click on the “Create Plantings” button
- Fill in the information for the new plant batch that you are creating
  - Once the information for the plant batch is filled out, click the “Create Plantings” button.

The plant batch will then be created in your immature plants tab. You’ll see in the “Origin Plant” column that the plant tag that you pulled the clones from.

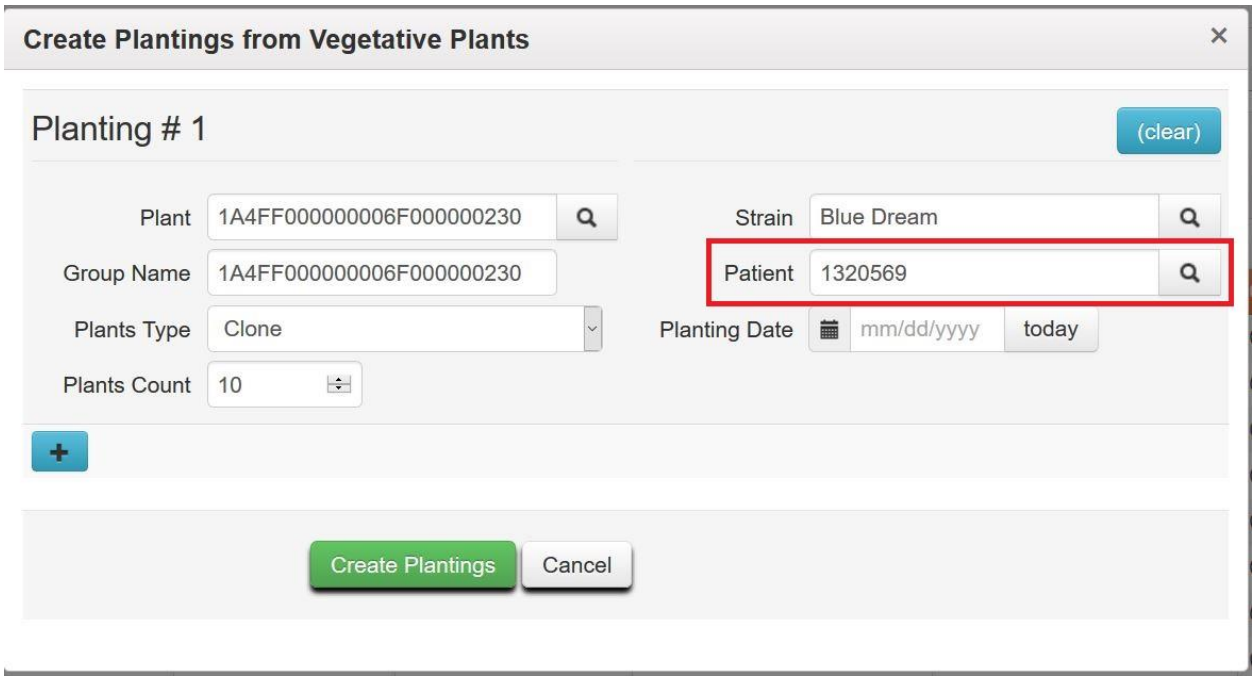


Creating plants from a package

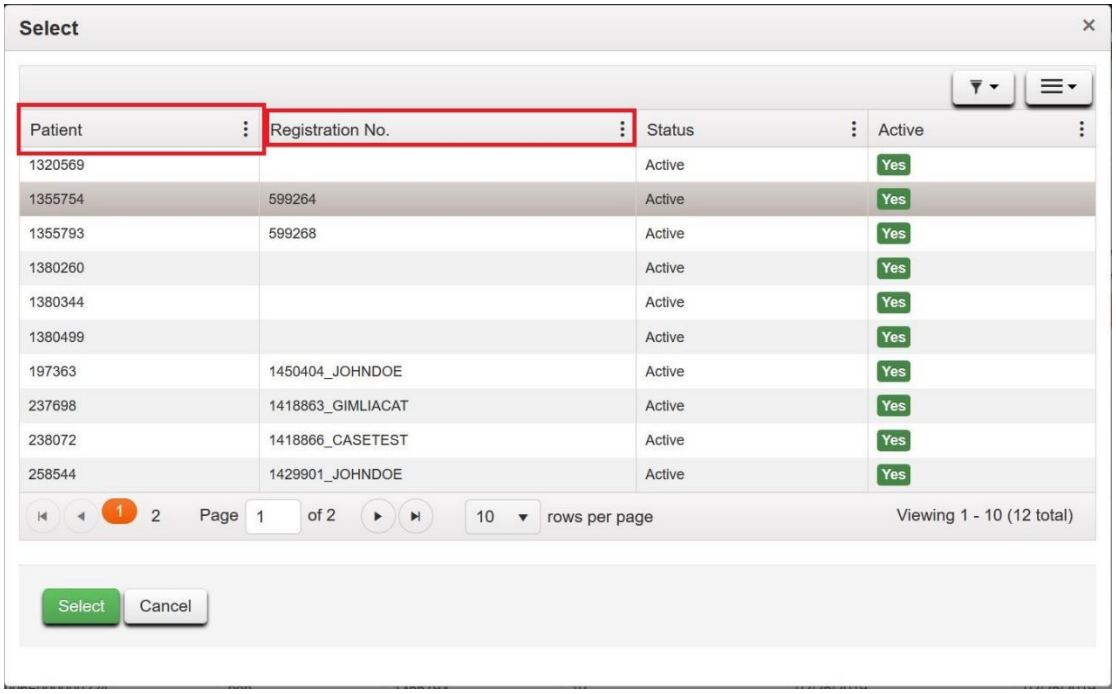
If you are creating plantings from a package of seeds and/or a package of immature plants that you’ve brought in on an external transfer from a patient, you’ll need to go to your active packages tab:



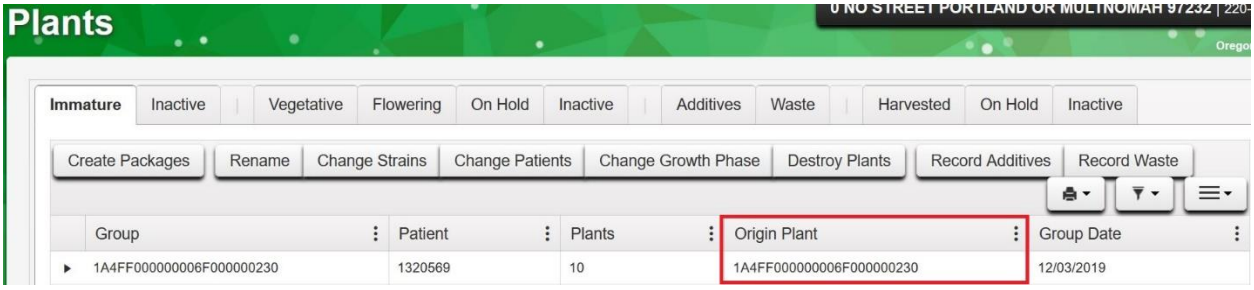
- Click on the package to create your plantings from, then click on the "Create Plantings" button
  Fill out the information for the new plant batch:



- On this screen, you will see the same information you have been required to fill in for creating plant batches before, with the new addition of the patient affiliation section. In order to fill in the patient affiliation, click on the search glass to the right of the patient field. A new pop up window will appear.



- On this screen there are several columns. The patient column indicates the Metrc designated number for the patient affiliated with the grow site. The registration column contains the OMMP card number along with the name of the grower assigned to that patient.
- Click on the patient you wish to affiliate the planting with and then click on the "Select" button.
- Once the information is filled out for the new plant batch, click on the "Create Plantings" button.
- You will then see the new plant batch created in your immature plants tab. The package tag that you used to create the plant batch will appear in the "Origin Package" column.



Harvest Weight, Waste, Packages and Moisture Loss

As part of the Daily Reconciliation Rules, harvests must have all of the wet weight of all harvested marijuana plants immediately after harvest. This means that the initial weight of your harvest should always be the weight of the plant at the time you cut the plant down.

- Failure to record your wet weight can lead to problems with the system calculating your moisture loss after all other weight is accounted for.
- Wet weight is required by rule, so the weight of the plant needs to be recorded prior to any post-harvest trimming, freezing, etc.

Within 45 days of harvesting a harvest lot, a GSA is required to have all packages, waste, and moisture loss calculated in CTS.

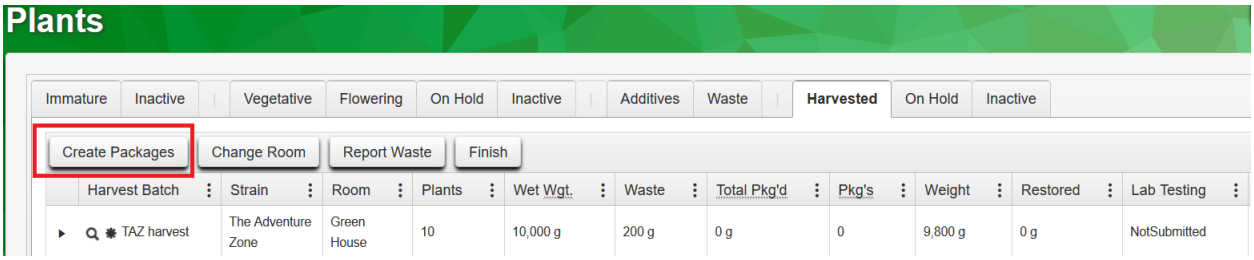
Recording Waste

Your waste that is recorded against a harvest should only be physical plant material that is being wasted out from the harvest. You should not calculate your moisture loss as waste. This waste should include all stalks, leaves, stems and other material deemed unusable by the growers/harvesters.

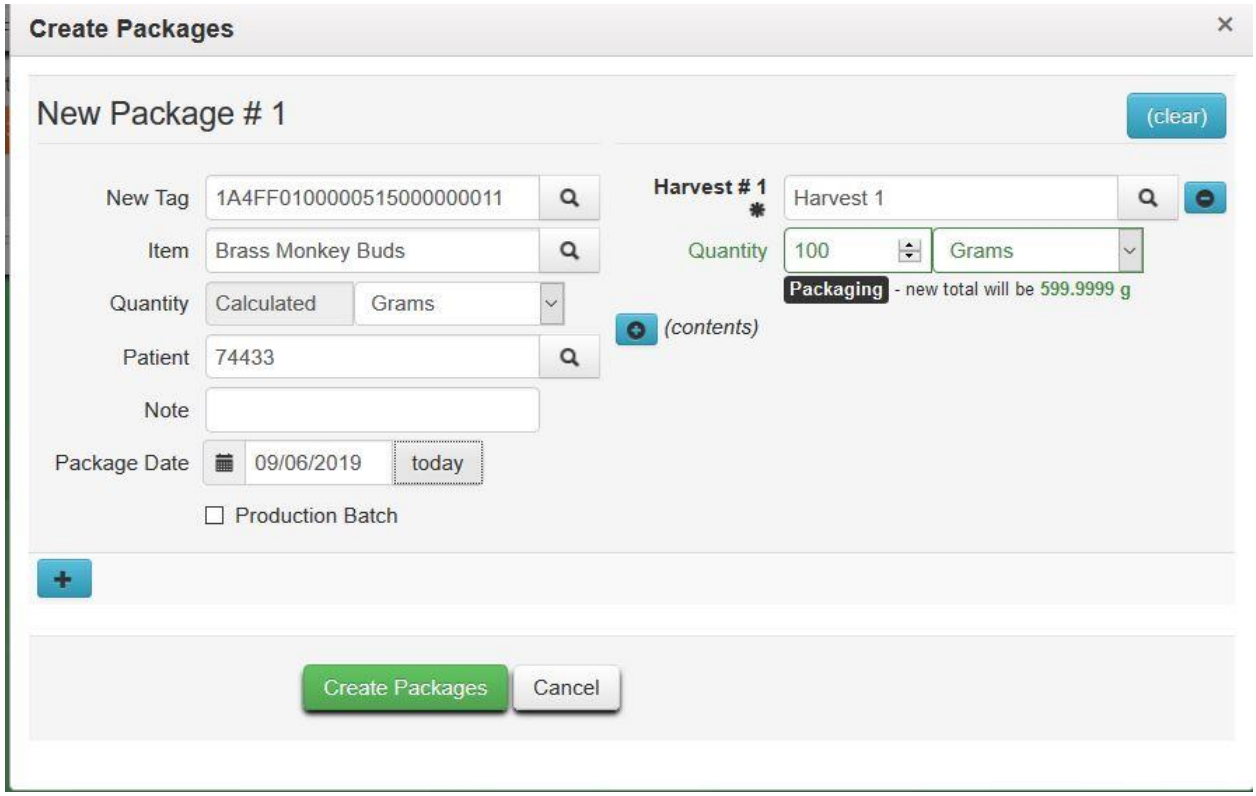
Creating Packages from a Harvest

Once your waste is recorded properly, you will then create your packages of usable marijuana. To do this, you will need to make sure you have items in your item list that are categorized as buds and/or shake/trim. To create items please refer to the [OMMP start-up Guide](). To create packages from the harvest:

- Click on the harvest you want to create packages from

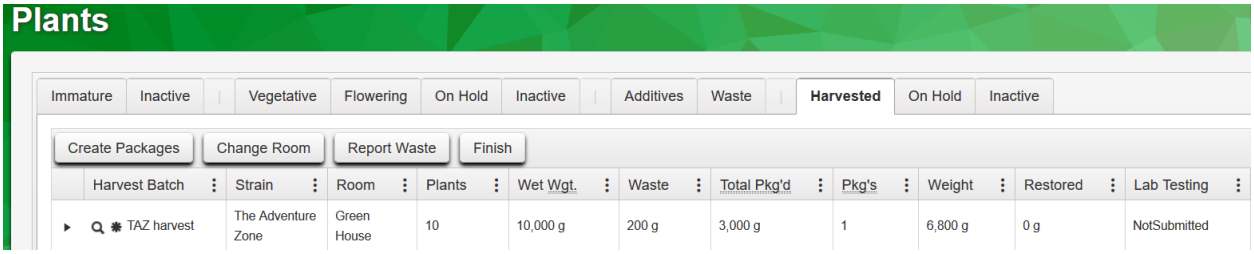


- Then click on the “Create Packages” button
- Fill in the information for the package creation and then click on the “Create Packages” button

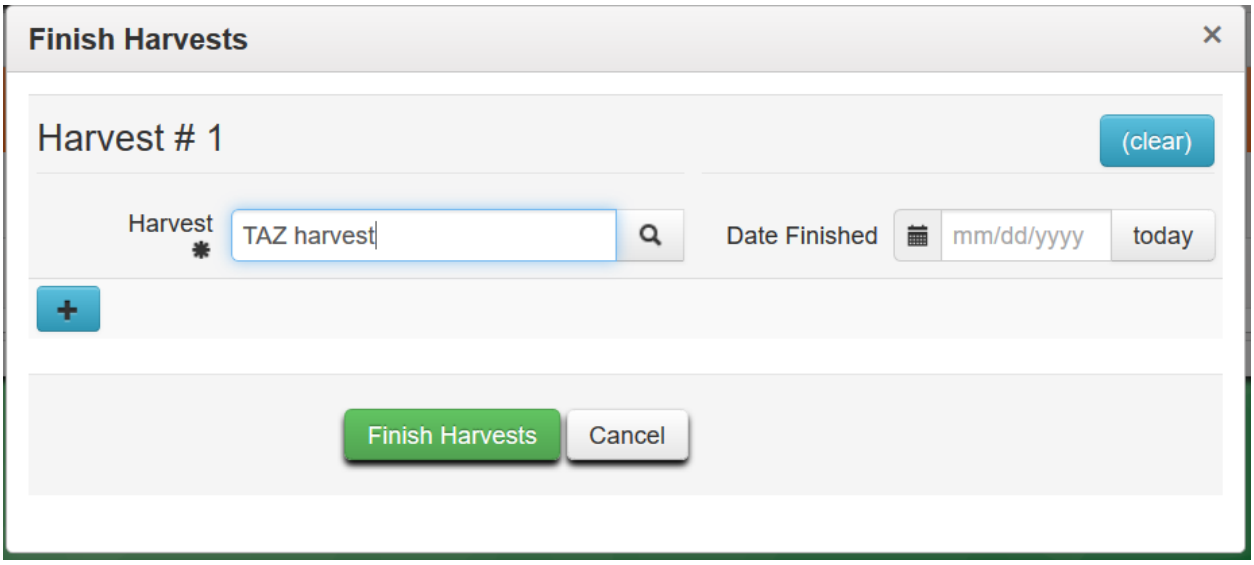


Calculating Moisture Loss and Finishing a Harvest

Once you've created your packages from your harvest and recorded your waste against the harvest you should have some weight left over in the weight column in Metrc:

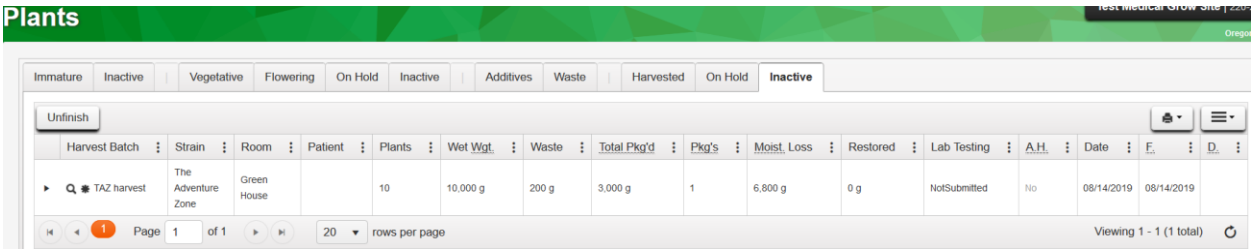


This is normal and what we expect to see when we look at your data. On or before the 45th day of the harvest, the moisture loss needs to be calculated and is likely whatever remaining weight that is left over in the weight column. To calculate moisture loss, click on the harvest to select it and then click "Finish".



A pop up window will appear confirming the name of the harvest batch and asking for the date the harvest was finished. Fill in the date information or simply click the “Today” button and then click on “Finish Harvests”.

The harvest will then be moved to your inactive harvests tab and as you can see below, the “weight” column has now become the “moisture loss” column. This is the way moisture loss is calculated by the system and these are the steps you should follow to accurately reflect the moisture loss process.



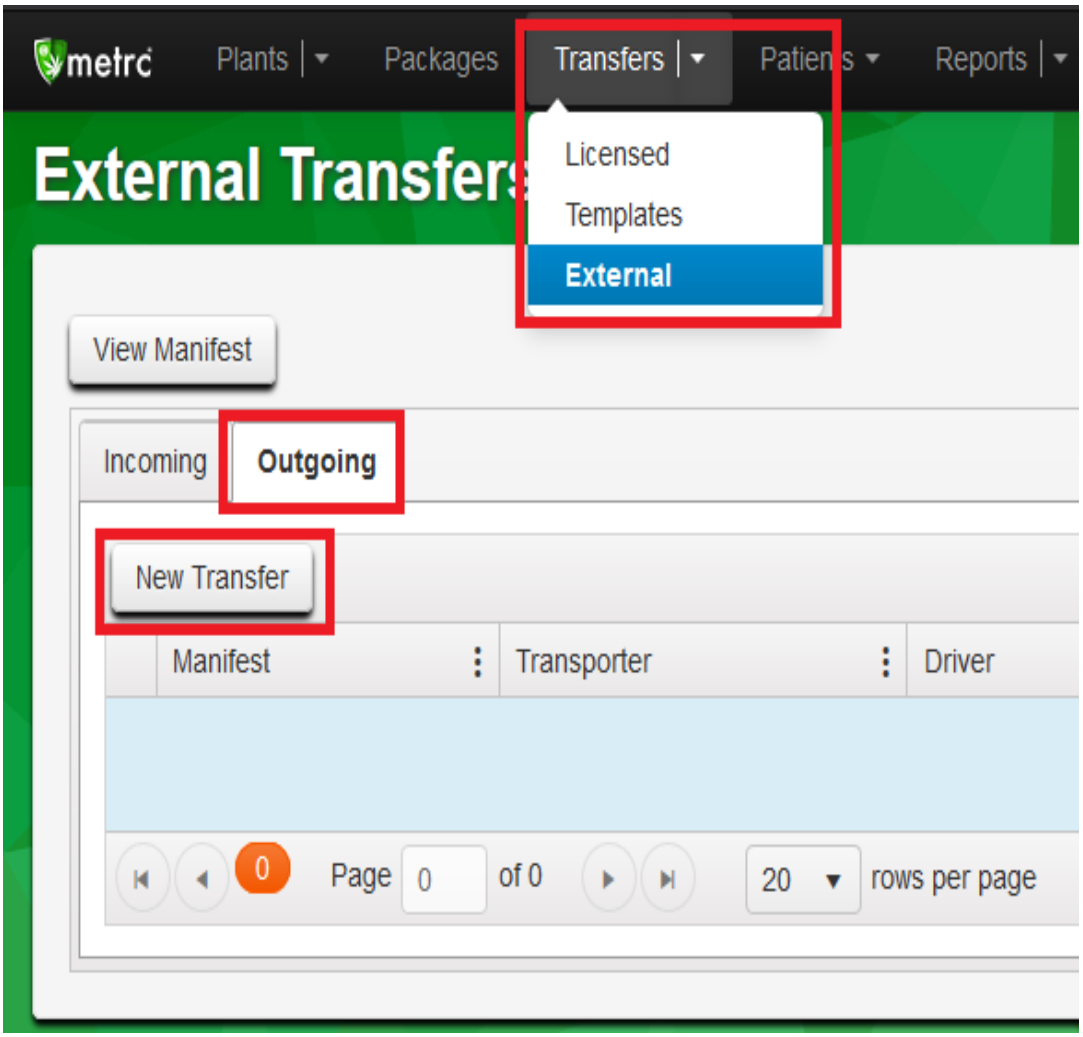
If for some reason you finish a harvest in error, you can click the “Unfinish” button to move the harvest back to your harvested tab and record more activity.

** Do NOT record your moisture loss as waste**

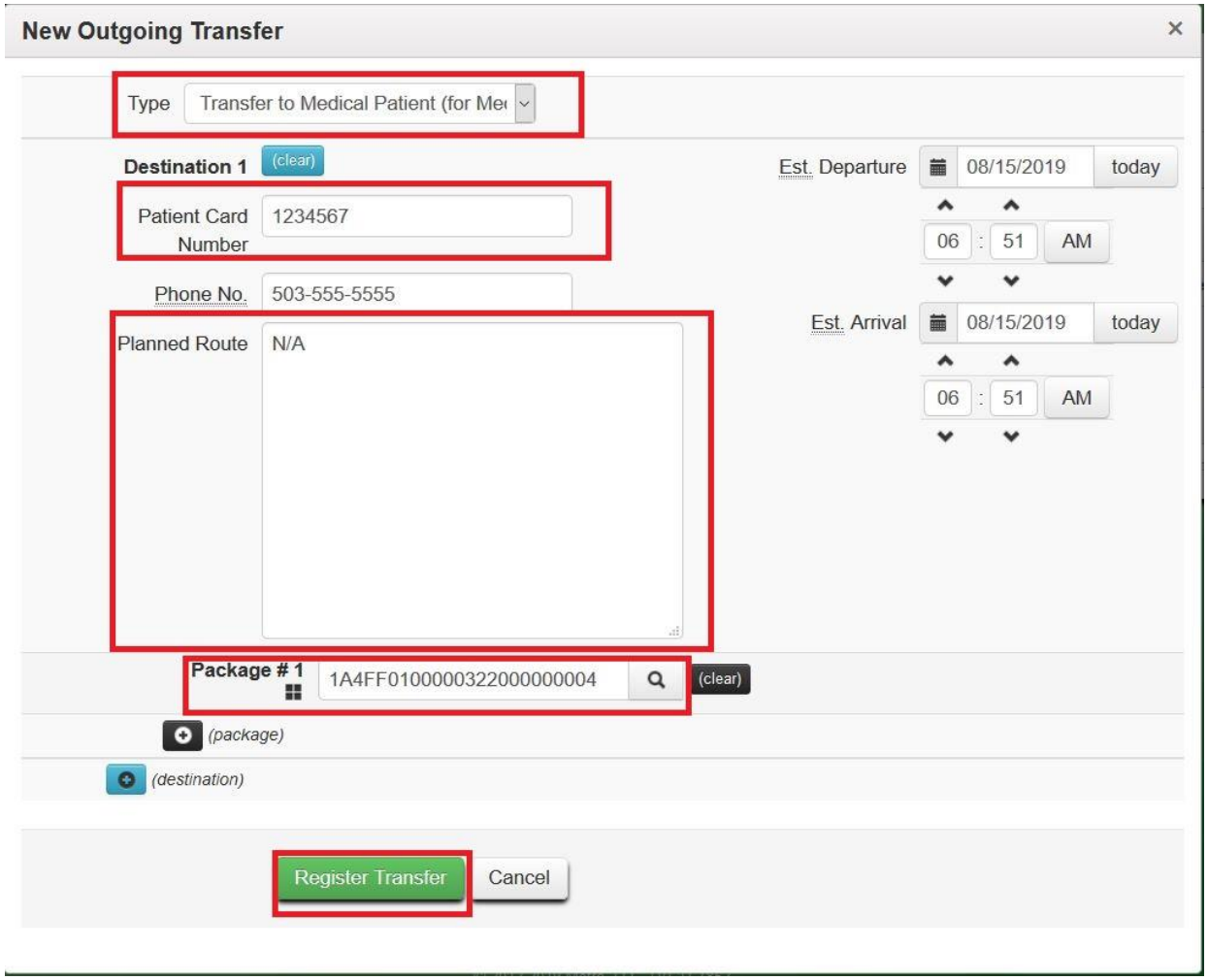
External Transfers to Patients

Once you have packages from harvests you'll want to transfer them to the appropriate patient.

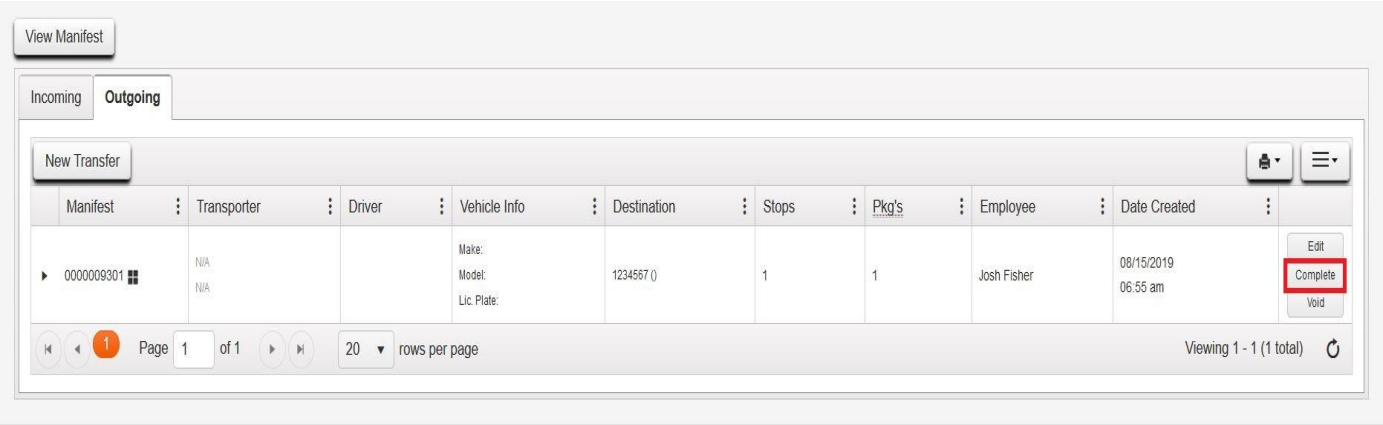
- To transfer out to a patient first select the "Transfers" tab and click on "External"
- Select the "Outgoing" button
- Click on the "New Transfer" button



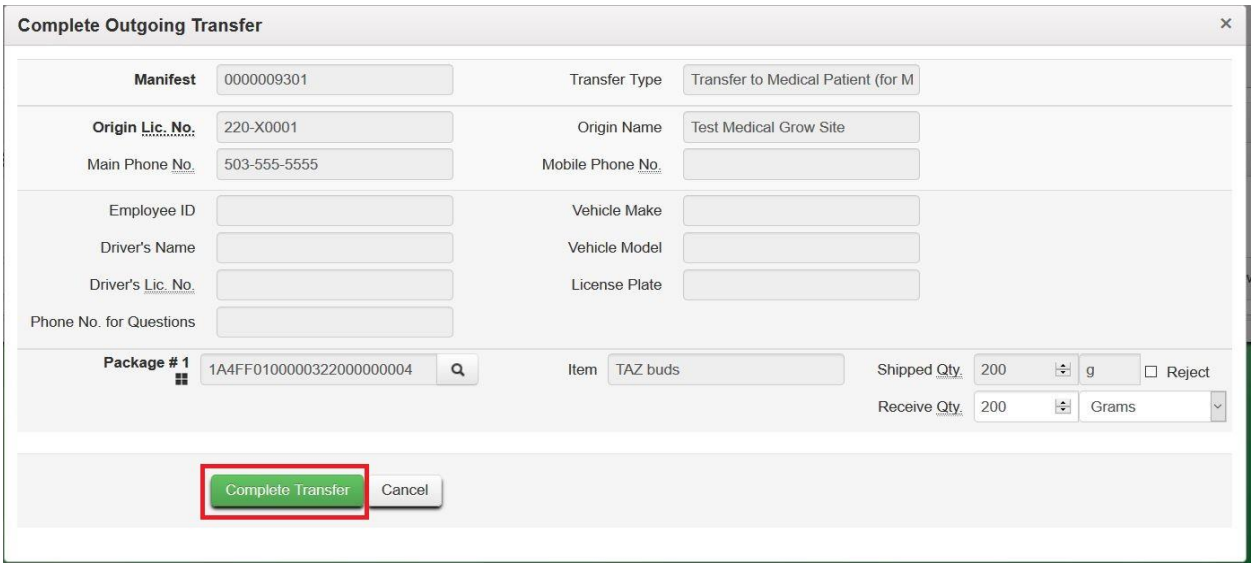
- Select the Type of transfer, in this case “External Transfer to Patient”



- Enter the OHA Patient or Caregiver Card Number to whom the transfer is being sent in the OMMP Card Number box.
- Enter the phone number of the driver
- Fill out the destination, route and departure and estimated arrival information
- Select the package or packages that are being transferred to the patient
- The black “plus” button will allow you to add multiple packages to the transfer
- Click “Register Transfer” when complete
- Once the transfer is registered, the transfer will now appear in your list of outgoing, external transfers.



- Click on the “complete” button in the far right column.



- A pop up window will appear asking you to confirm the quantity received. Click the green “complete transfer” button once the patient has received their product.