

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.

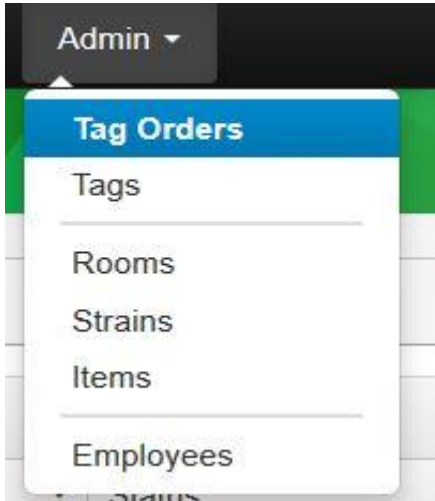
Tags:

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

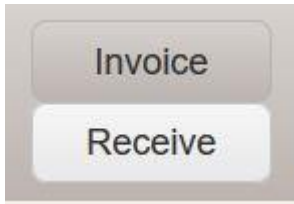


- Find the tag order that was received

A screenshot of the CTS 'Tag Orders' page. The page title is 'Tag Orders' and the user is 'OR Lofly Rec-Producer B | 020-3'. The page has tabs for 'Current' and 'History'. A 'New Tag Order' button is at the top left. A table lists several orders with columns for Order Number, Order Date, Status, Total, Paid, Tracking Number, and User. The first row is highlighted with a red border. To the right of the table are 'Invoice' and 'Receive' buttons for each row.

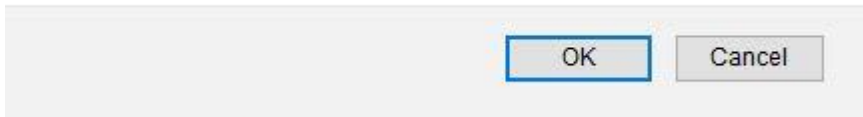
Order Number	Order Date	Status	Total	Paid	Tracking Number	User	
Demo-OR-2017-045-0166	02/14/2017 06:29 pm	Shipped	\$0.00	\$0.00	1A400xjoclamzqphaae	RETAILER OWNER	Invoice Receive
Demo-OR-2017-045-0165	02/14/2017 06:29 pm	Shipped	\$0.00	\$0.00	1A400zbiyoskghgpxbgh	RETAILER OWNER	Invoice Receive
Demo-OR-2017-045-0164	02/14/2017 06:29 pm	Shipped	\$0.00	\$0.00	1A400cc1mk2kpcpmxukw	RETAILER OWNER	Invoice Receive
Demo-OR-2017-045-0162	02/14/2017 06:28 pm	Shipped	\$0.00	\$0.00	1A400ilkazhp6lptpo8	RETAILER OWNER	Invoice Receive

- 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”

Are you sure you wish to receive Tag Order # Demo-OR-2017-045-0167?



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

OR Lofty Rec-Producer B | 020-
Oregon

Tag Orders

Current History

Order Number	Order Date	Status	Total	Paid	Tracking Number	User	
▶ Demo-OR-2017-045-0167	02/14/2017 06:29 pm	Received	\$0.00	\$0.00	1A400w6detrqhu3makbz	RETAILER OWNER	Invoice
▶ Demo-OR-2017-045-0163	02/14/2017 06:29 pm	Received	\$0.00	\$0.00	1A400ahqb85elbv3fuys	RETAILER OWNER	Invoice
▶ Demo-OR-2017-045-0158	02/14/2017 06:28 pm	Received	\$0.00	\$0.00	1A400lg1f9xye04vdt6g	RETAILER OWNER	Invoice
▶ Demo-OR-2017-045-0145	02/14/2017 06:26 pm	Received	\$0.00	\$0.00	1A400ycaoljvguahijgf	RETAILER OWNER	Invoice

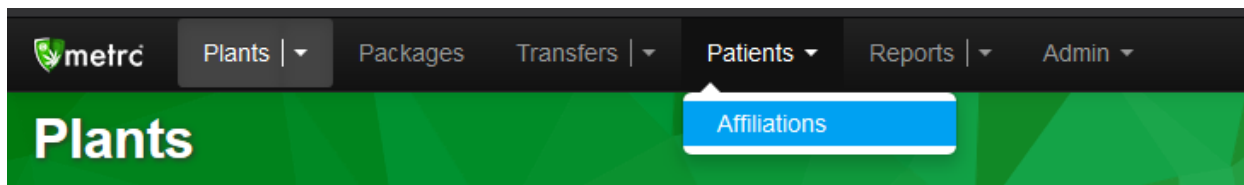
Assigning a UID tag includes both associating the tag with an item in CTS and physically affixing the tag to the marijuana item matching that association in CTS.

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_HERIBERTO GARAY	Active
250233	1418583_TESTINGTHREE	Active
337114	1418848_SHOOKCOOK	Active
349135	1418838_BLACKWIDOW	Active
357209	1482303_HERIBERTO GARAY	Active
357342	1484055_MANUELMOJARROJR	Active
357379	1484349_MANUELMOJARROJR	Active
357412	1484540_MANUELMOJARROJR	Active
59827	1461531_MANUELMOJARROJR	Active
61614	1456381_HERIBERTO GARAY	Active
70052	1385949_CHOPDACAT	Active
74433	1462274_HERIBERTO GARAY	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@dhs.ohio.gov or 971-673-1234. All patient information feeds from OHA to Metrc.

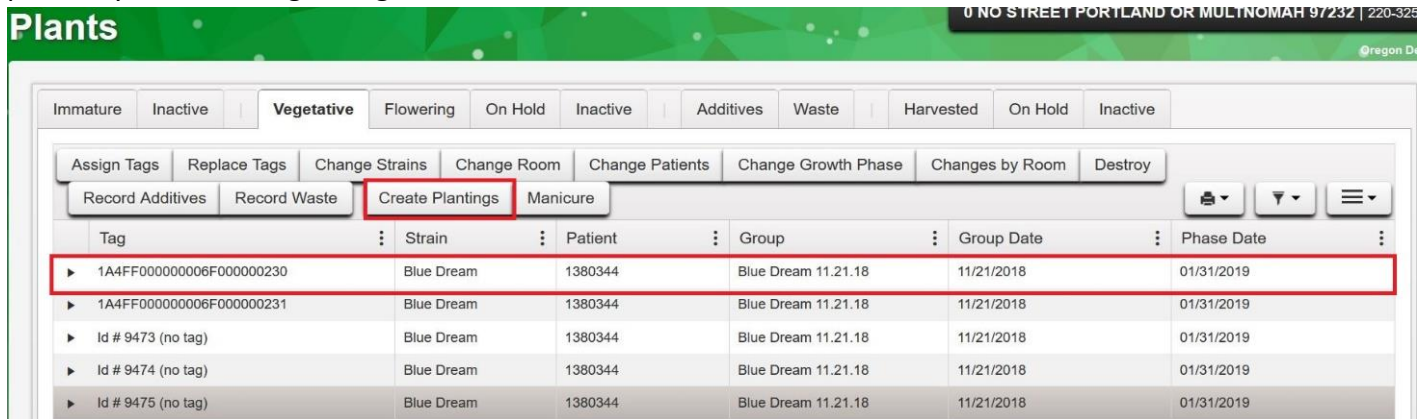
Creating Plantings:

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

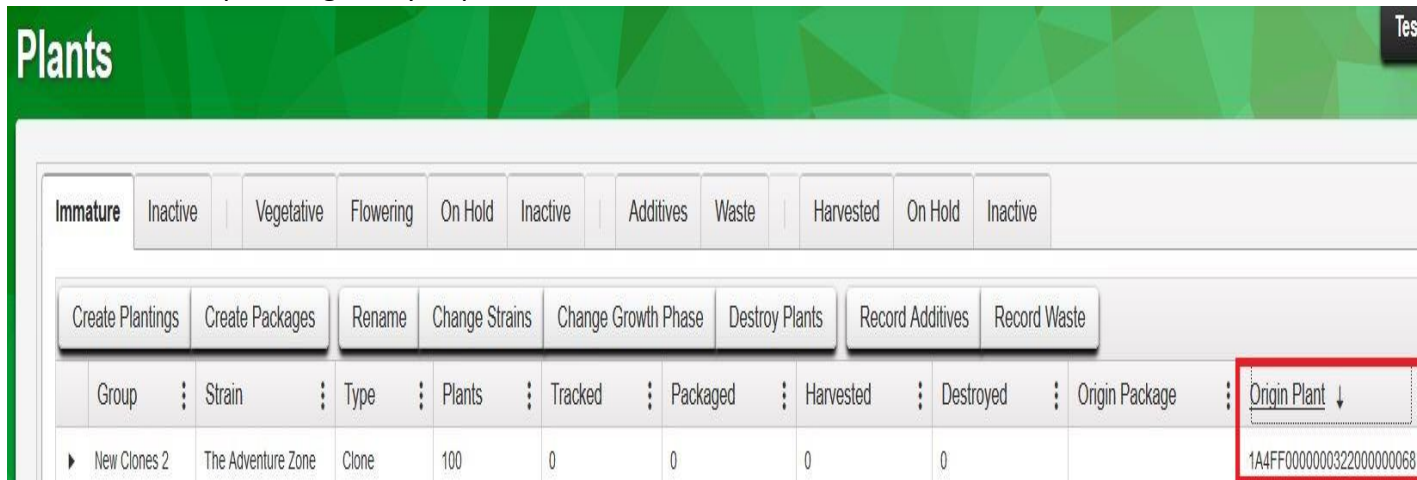
If you are creating clones from a mother plant at your facility you will need to document the taking of those cuttings in CTS. To create plants from an existing plant, you will need a tagged

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:

Packages

Active On Hold Inactive

New Packages Submit for Testing Remediate Create Plantings New Transfer Change Items Adjust Finish

Tag	Src. H's	Src. Pkg's	Item	Category	Item Strain	Quantity	P.B. No.	Lab Testing
▶ 🔍 1A4FF0100000322000000002	M1	1A4FF0100000322000000001	TAZ	Seeds (each)		10 ea		NotSubmitted

Page 1 of 1 20 rows per page

- 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:

Create Plantings from Vegetative Plants

Planting # 1 (clear)

Plant	1A4FF000000006F000000230 🔍	Strain	Blue Dream 🔍
Group Name	1A4FF000000006F000000230	Patient	1320569 🔍
Plants Type	Clone	Planting Date	mm/dd/yyyy today
Plants Count	10		

+ Create Plantings Cancel

- 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.

Patient	Registration No.	Status	Active
1320569		Active	Yes
1355754	599264	Active	Yes
1355793	599268	Active	Yes
1380260		Active	Yes
1380344		Active	Yes
1380499		Active	Yes
197363	1450404_JOHNDOE	Active	Yes
237698	1418863_GIMLIACAT	Active	Yes
238072	1418866_CASETEST	Active	Yes
258544	1429901_JOHNDOE	Active	Yes

Page 1 of 2 | 10 rows per page | Viewing 1 - 10 (12 total)

Select Cancel

- 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 OMMMP 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 Plant” column.

Group	Patient	Plants	Origin Plant	Group Date
▶ 1A4FF000000006F000000230	1320569	10	1A4FF000000006F000000230	12/03/2019

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

The screenshot shows the 'Plants' management interface. At the top, there are tabs for different stages: Immature, Inactive, Vegetative, Flowering, On Hold, Inactive, Additives, Waste, and Harvested. Below these tabs is a row of action buttons: 'Create Packages' (highlighted with a red box), 'Change Room', 'Report Waste', and 'Finish'. Below the buttons is a table with the following columns: Harvest Batch, Strain, Room, Plants, Wet Wgt., Waste, Total Pkg'd, Pkg's, Weight, Restored, and Lab Testing. The table contains one row of data:

Harvest Batch	Strain	Room	Plants	Wet Wgt.	Waste	Total Pkg'd	Pkg's	Weight	Restored	Lab Testing
▶ TAZ harvest	The Adventure Zone	Green House	10	10,000 g	200 g	0 g	0	9,800 g	0 g	NotSubmitted

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

Create Packages ✕

New Package # 1 (clear)

New Tag: 1A4FF0100000515000000011 🔍

Item: Brass Monkey Buds 🔍

Quantity: Calculated Grams ▼

Patient: 74433 🔍

Note:

Package Date:

Production Batch

Harvest # 1: Harvest 1 🔍 ⊖

Quantity: 100 Grams ▼

Packaging - new total will be 599.9999 g

+ (contents)

+ +

Create Packages
Cancel

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:

Plants											
Immature	Inactive	Vegetative	Flowering	On Hold	Inactive	Additives	Waste	Harvested	On Hold	Inactive	
Create Packages Change Room Report Waste Finish											
Harvest Batch	Strain	Room	Plants	Wet Wgt.	Waste	Total Pkg'd	Pkg's	Weight	Restored	Lab Testing	
▶ 🔍 * TAZ harvest	The Adventure Zone	Green House	10	10,000 g	200 g	3,000 g	1	6,800 g	0 g	NotSubmitted	

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.

Plants

Test Medical Order Data | Oregon

Immature Inactive Vegetative Flowering On Hold Inactive Additives Waste Harvested On Hold Inactive

Unfinish

Harvest Batch	Strain	Room	Patient	Plants	Wet Wgt	Waste	Total Pkg'd	Pkg's	Moist. Loss	Restored	Lab Testing	A.H.	Date	F.	D.
TAZ harvest	The Adventure Zone	Green House		10	10,000 g	200 g	3,000 g	1	6,800 g	0 g	NotSubmitted	No	08/14/2019	08/14/2019	

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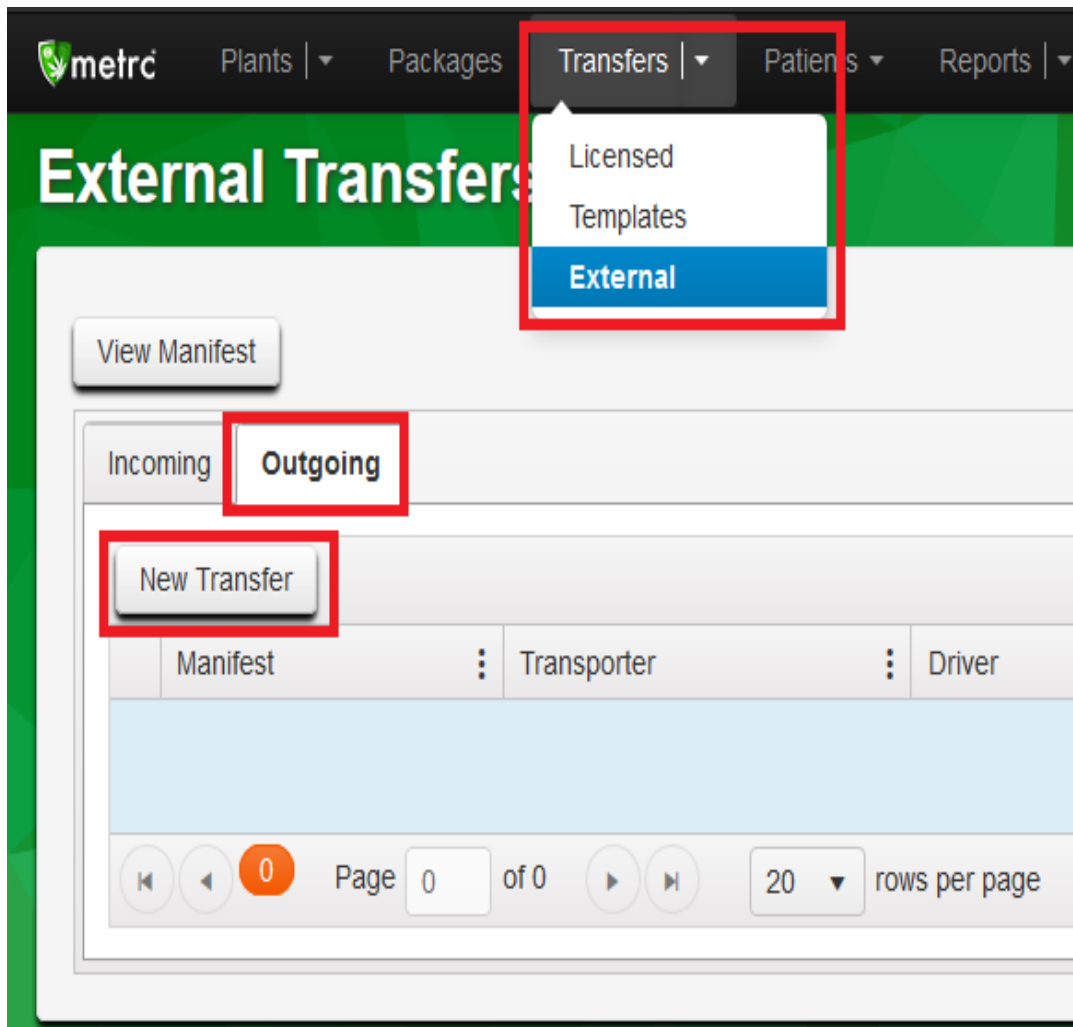
If for some reason you finish a harvest in error, you can click the “Unfinish” button to move the harvest back to your harvested tab and record more activity.

**** 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”

The screenshot shows a web form titled "New Outgoing Transfer". The form contains the following fields and controls:

- Type:** A dropdown menu set to "Transfer to Medical Patient (for Me)".
- Destination 1:** A section with a "(clear)" button and three input fields:
 - Patient Card Number:** 1234567
 - Phone No.:** 503-555-5555
 - Planned Route:** N/A
- Est. Departure:** A date/time picker set to 08/15/2019 at 06:51 AM.
- Est. Arrival:** A date/time picker set to 08/15/2019 at 06:51 AM.
- Package # 1:** An input field containing the ID "1A4FF0100000322000000004" with a search icon and a "(clear)" button.
- Buttons:** A green "Register Transfer" button and a grey "Cancel" button.

- 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.

View Manifest

Incoming **Outgoing**

New Transfer

Manifest	Transporter	Driver	Vehicle Info	Destination	Stops	Pkg's	Employee	Date Created	
▶ 0000009301	N/A N/A		Make: Model: Lic. Plate:	1234567 ()	1	1	Josh Fisher	08/15/2019 06:55 am	<input type="button" value="Edit"/> <input type="button" value="Complete"/> <input type="button" value="Void"/>

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

Complete Outgoing Transfer

Manifest: 0000009301 Transfer Type: Transfer to Medical Patient (for M)

Origin Lic. No.: 220-X0001 Origin Name: Test Medical Grow Site

Main Phone No.: 503-555-5555 Mobile Phone No.:

Employee ID: Vehicle Make:

Driver's Name: Vehicle Model:

Driver's Lic. No.: License Plate:

Phone No. for Questions:

Package # 1: 1A4FF0100000322000000004 Item: TAZ buds Shipped Qty: 200 g Reject

Receive Qty: 200 Grams

- 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.