

Setting up and using METRC (Cannabis Tracking System) For Medical Registrants



Training Opportunities and Resources

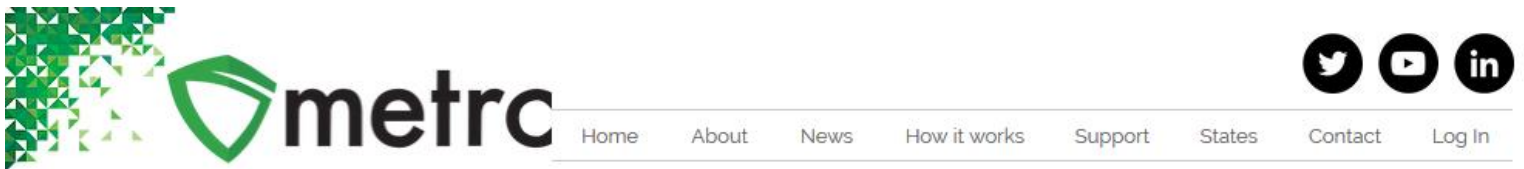
METRC Training

- ▶ There are multiple trainings available to familiarize yourself with METRC tracking requirements and how the system works:
 - ▶ PowerPoint presentations from OHA, OLCC, and METRC's presentations during the recent statewide "road show" on medical tracking are available here:
https://www.oregon.gov/oha/PH/DISEASES/CONDITIONS/CHRONIC_DISEASE/MEDICALMARIJUANA/PROGRAM/Pages/reporting.aspx
 - ▶ Videos from the presentations are available on OLCC's YouTube page:
<https://www.youtube.com/user/OLCC2008>
 - ▶ METRC webinars are available on METRC's website:
<https://www.metro.com/oregon>
 - ▶ Oregon Metrc Wiki: <https://wiki-or.metro.com>

To Find and Register for Training

► Go to <https://www.metrcllc.com/oregon>

Click on “Schedule Training Now”



Oregon Program Information

[FAQs](#) [Resources](#) [Integration & API](#) [Training](#)

On behalf of the Oregon Liquor Control Commission I welcome you to the Metrc LLC Metrc Oregon website.

The Metrc Cannabis Tracking System (CTS) is an integral part the OLCC's responsibility to ensure that recreational marijuana products can be tracked in the regulated market. Every OLCC Recreational Marijuana licensee is required to participate in the CTS.

Metrc is responsible for the technical and operational components of the CTS; the OLCC is responsible for CTS statutory and regulatory issues. Franwell provides licensees with training sessions and webinars to provide a thorough understanding of the CTS. Prospective licensees will be required to pass a test on their knowledge of the CTS before the OLCC issues their license.

We hope you will use the information and tools found here and on the OLCC Recreational Marijuana website to become successful licensees in this newly



Schedule Training Now

Training Videos

Validated Software Providers

To Find and Register for Training

When prompted, select “OMMP”

Advanced New Business OMMP

010 ▼ License number

To Find and Register for Training

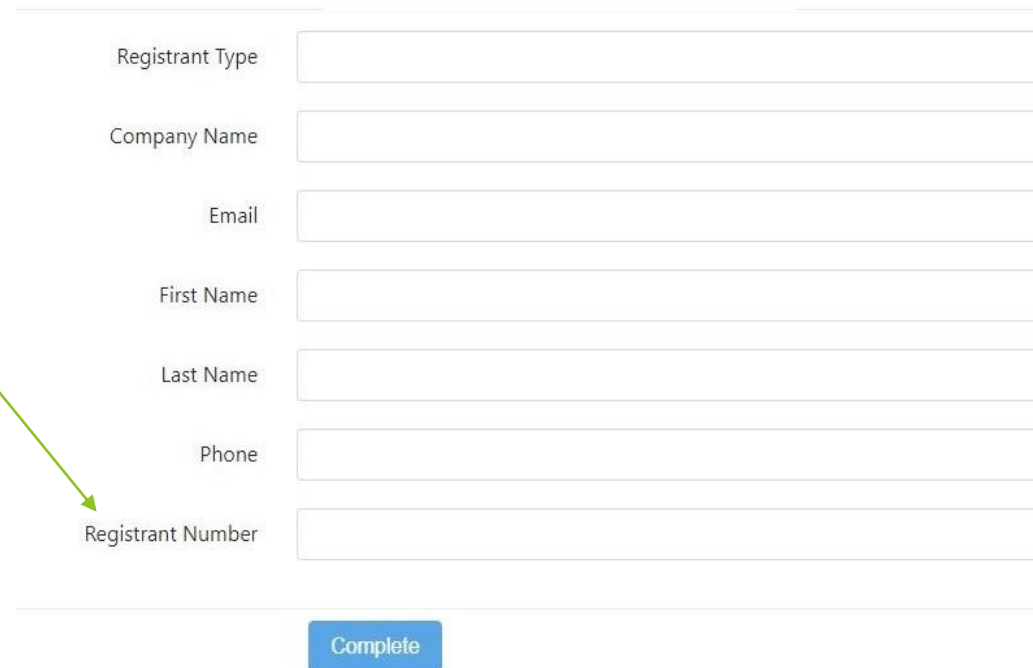
Advanced New Business OMMP						
Jul 2018						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Select the date you wish to take your new business training. Available dates are clickable, unavailable dates will be grayed out

To Find and Register for Training

- Fill out the information requested on the form and click complete

Enter your OMMP
grower, processor,
or dispensary
registration
number here



Registrant Type

Company Name

Email

First Name

Last Name

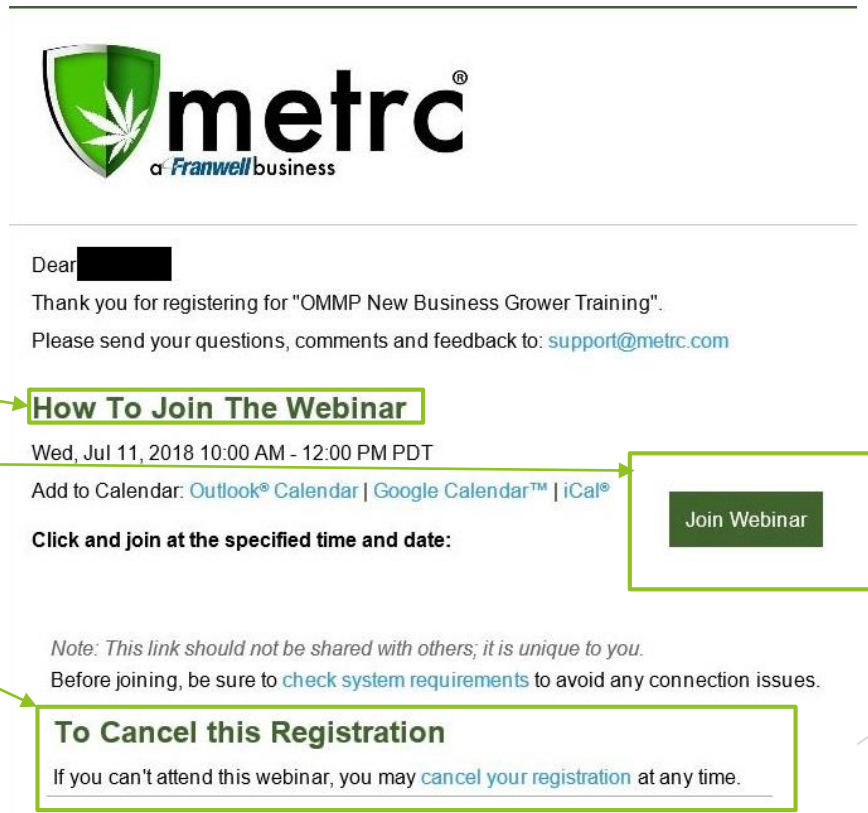
Phone

Registrant Number


[Complete](#)

To Find and Register for Training

- ▶ After registering for the training you'll receive an email with a link to the webinar
- ▶ Your scheduled day and time will appear here
- ▶ This is your live link to join the webinar
- ▶ If you need to cancel your registration click here
- ▶ If you cancel don't forget to reschedule!



The screenshot shows an email from Metrc, a Franwell business. The email is addressed to a redacted name. It thanks the recipient for registering for "OMMP New Business Grower Training" and provides a contact email for support. The email includes a section titled "How To Join The Webinar" which specifies the date and time (Wed, Jul 11, 2018 10:00 AM - 12:00 PM PDT) and provides links to add the event to Outlook, Google Calendar, or iCal. A "Join Webinar" button is also present. Below this, a note states that the link is unique and not to be shared, and advises checking system requirements. At the bottom, a section titled "To Cancel this Registration" provides a link to cancel the registration at any time.

 **metrc**[®]
a Franwell business

Dear [REDACTED]

Thank you for registering for "OMMP New Business Grower Training".
Please send your questions, comments and feedback to: support@metrc.com

How To Join The Webinar

Wed, Jul 11, 2018 10:00 AM - 12:00 PM PDT

Add to Calendar: [Outlook® Calendar](#) | [Google Calendar™](#) | [iCal®](#)

Click and join at the specified time and date:

[Join Webinar](#)

*Note: This link should not be shared with others; it is unique to you.
Before joining, be sure to [check system requirements](#) to avoid any connection issues.*

To Cancel this Registration

If you can't attend this webinar, you may [cancel your registration](#) at any time.

Getting Signed Up and Set Up in Metrc

First Time Access to METRC

- ▶ Within a few days of paying the \$480 CTS fee in OMMOS you'll receive an email from METRC with a first time log-in link, your username, and first time log-in key
- ▶ This log-in key expires 24 hours after you first receive it, so make sure you log-in within that 24 hour window.
- ▶ When METRC loads you'll be prompted to set up your account

Welcome to Metrc@!

Your username:

Log-in and set your password here:

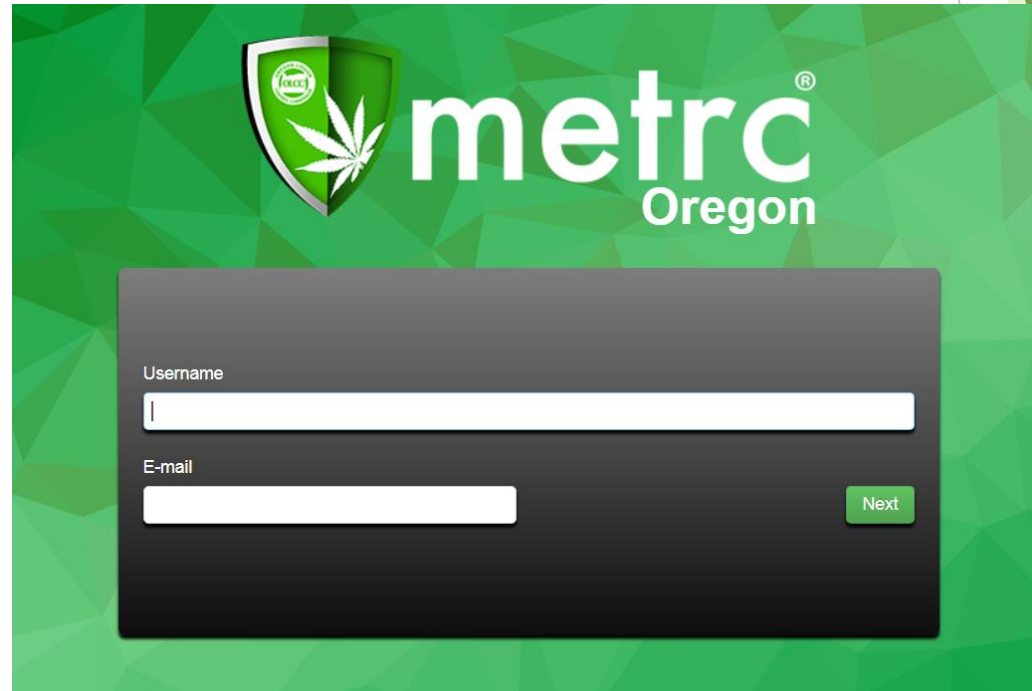
First Time log-in key:

Your e-mail:

Log-in key and link expire

First Time Access to METRC

- ▶ If you do not click the link in the email before it expires (within 24 hours) you can activate your account by:
 - ▶ Contacting METRC support (support@metrc.com or calling 877-566-6506); they are able to send a new email with a new activation link.
 - ▶ Navigating to <https://or.metrc.com/password/reset> and entering the username and email of the person who paid the \$480 CTS fee in OHA's OMMOS system; the username can be found in the original email sent by METRC.

The image shows the METRC Oregon logo at the top, featuring a green shield with a white cannabis leaf and the text "metrc Oregon". Below the logo is a dark gray registration form. The form has two input fields: "Username" and "E-mail". The "Username" field is a long white box. The "E-mail" field is a shorter white box. To the right of the "E-mail" field is a green button with the text "Next".

metrc[®]
Oregon

Username

E-mail

Next

Initial Account Set Up

- ▶ Once you click on the link provided by the email, you'll be sent to the account set up screen. Your full name, email and username will be prepopulated. You can then set up your password, phone number and security question.

- ▶ Click Save Profile when Finished.

Contact Info.

Full Name

E-mail

Phone Number

Security Info.

Username

Password

Confirm Password

Account Recovery

Security Question

Security Answer

☐ View Security Answer

Initial Account Set Up, cont'd

- ▶ When logging in you will be able to navigate within the system using the tabs across the top of the screen



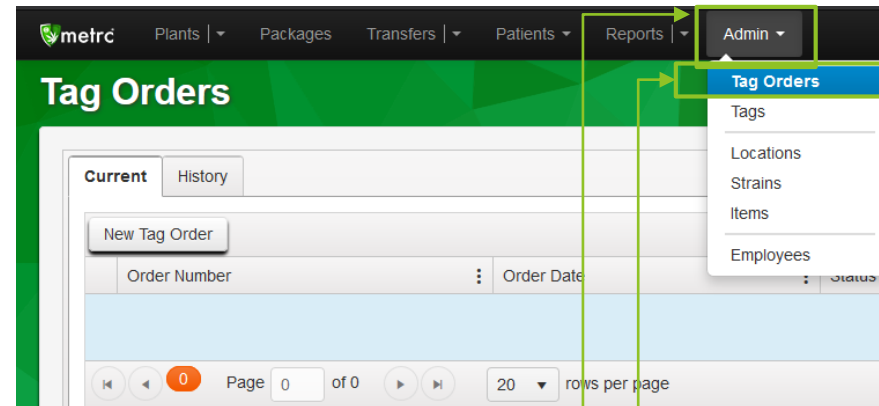
- ▶ Your “Facility License Number” can be seen in the top-right of the screen; this is also how you choose which Metrc facility to access if your user account has access to more than one
- ▶ Anytime you call the Metrc support desk you will be asked for this Facility License Number

Admin Set Up

- ▶ There are several steps in making sure that once your account is set up, that you are ready to use the METRC system completely. Each “facility” in Metrc is an individual grow site, processing site, or dispensary.
- ▶ For each Facility:
 - ▶ Order RFID Package and Plant Tags
 - ▶ Add:
 - ▶ Employees
 - ▶ Strains
 - ▶ Items
 - ▶ Locations (for Growers)
 - ▶ Repeat as necessary for each facility

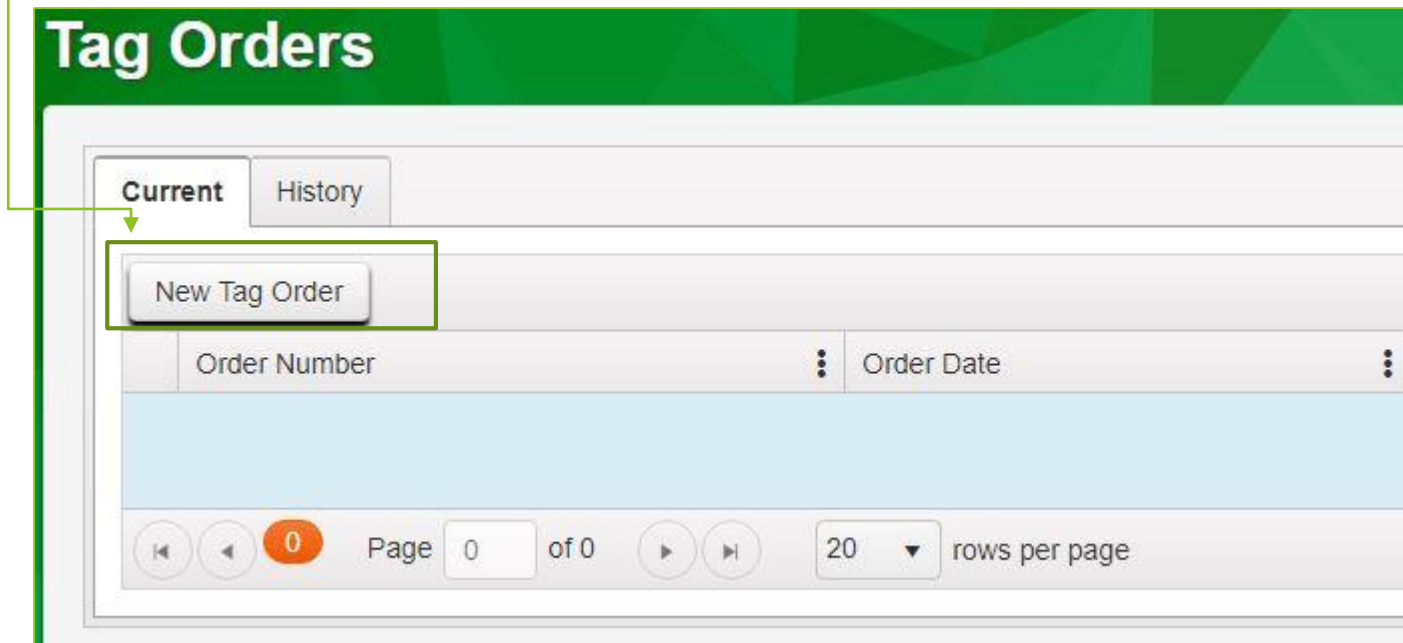
Order Tags

- ▶ Once you have access to METRC you should make sure to order your tags as soon as possible.
- ▶ You won't be able to add or track your inventory in METRC until you have your tags.
- ▶ The sooner you place the order, the sooner you can add your inventory.
- ▶ Click the “Admin” tab
 - ▶ Select “tag orders”



Order Tags

- Select the “New Tag Order” button on the left of the screen



Order Tags

- Fill in the information requested.
 - For Medical Growers the tags you order will be Medical, not Retail as shown in the image.
 - Order the number of tags you need for both packages and plants. You'll need both types of tags.
 - Select your payment method and fill in the information requested.
 - Once completed click the “Place Order” button to place the order.

The screenshot shows a web form for ordering tags, divided into four sections: Order Details, Shipping Details, Payment methods, and a final action bar. Green arrows from the instructions point to the 'Retail Plant' and 'Retail Package' fields in the Order Details section, the 'Facility' dropdown in the Shipping Details section, and the 'Place Order' button in the final action bar.

Order Details

Facility License	OR LOFTY ESTABLISHMENT, LLC 020-X0001	Retail Plant	Count	✕	(\$0.45 ea., 5,000 max.)	\$0.00
Physical Address	9079 SE McLoughlin Blvd. Portland, OR 97222-7355	Retail Package	Count	✕	(\$0.25 ea., 5,000 max.)	\$0.00
Subtotal						\$0.00

Shipping Details

Contact Name	Joshua Fisher	Shipping/Handling	--
Phone No.	+1-800-420-MAIN	Taxes	--
Copy from	Facility ▼	Total Amount	--
Ship Address *			
Address Cont.			
City			
State + Zip	AL ▼		

* Tags cannot be shipped to P.O. Boxes

Payment methods

☐ Credit card

☐ Check or Money Order

Place OrderCancel

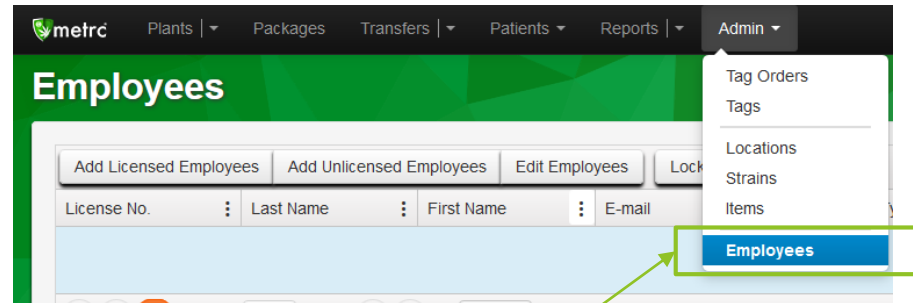
Order Tags

- ▶ Once you have ordered tags, METRC will print and ship them.
 - ▶ You'll receive a tracking number and will have a short window to void the order if it was made in error.
 - ▶ This window varies based on the time of day the order is placed.
 - ▶ Once you physically receive the tags from UPS, make sure to log into METRC and click the "Receive" button in the "tag orders" section.
 - ▶ **Tags cannot be used in METRC until the Receive button has been clicked!**

Order Number	Order Date	Status	
Demo-OR-2017-045-0202	02/14/2017 06:34 pm	Shipped	<div>Invoice</div> <div>Receive</div>

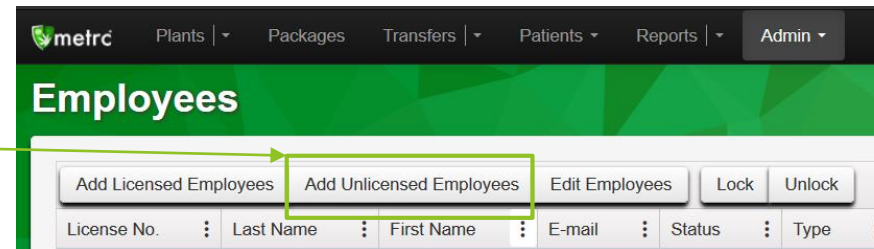
Add Employees

- ▶ Each facility administrator may add other users into the METRC system with defined levels of access.
 - ▶ “Employees” may be other growers, others working at the processor or dispensary, or a third-party you work with
 - ▶ Any user can be given permission to view and/or enter data in METRC
 - ▶ Although the GSA, PRP, or PRD is responsible, any user can be granted permission to enter data
- ▶ To Add an Employee first go to the “Admin tab” and select “Employees”



Add Employees

- ▶ Once on the Employees page click the Add Unlicensed Employees Button located at the top of the list.



- ▶ Growers at Medical Grow Sites do not require an OLCC issued worker permit so in Metrc they would be classified as “Unlicensed” employees.
- ▶ If a grower also has an OLCC worker permit they may be added as a licensed employee, but they do not have to be added as a licensed employee if they are working at a medical grow site

Add Employees

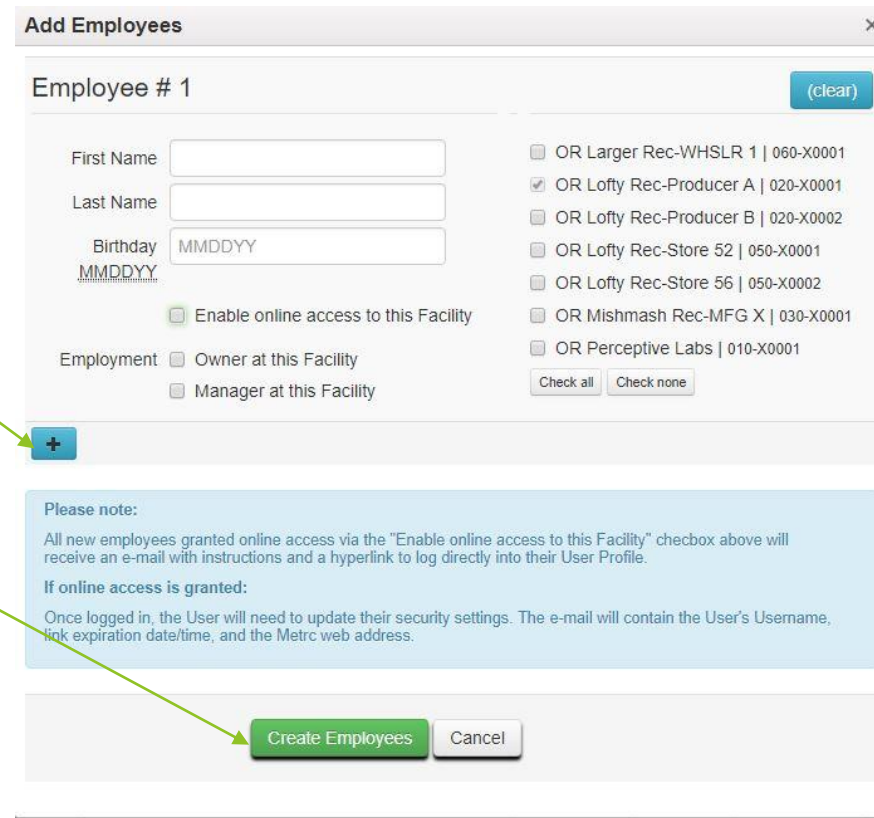
- ▶ This form will appear:
- ▶ If the box labeled “Enable online access to this Facility” is checked, you will need to click on the various privileges that you are granting that employee access to: Plants page, Transfers Page, permission to view and/or manage the data on each page.
- ▶ If you have multiple facilities you can also select permissions to give to that employee for each facility that you operate

The screenshot shows the 'Add Employees' form with the following sections and annotations:

- Employee # 1** (with a '(clear)' button)
- Personal Information:** First Name, Last Name, Birthday (MMDDYY), E-mail, Phone Number (+1-123-456-7890), Home (- Select Home -).
- Employment:** Owner at this Facility, Manager at this Facility.
- Permissions:** A green arrow points from the 'Enable online access to this Facility' checkbox to this section.
- Plants Page:** Includes sub-sections for Immature Plants, Veg/Flower Plants, Additives, Waste, Harvests, Packages Page, Transfers Menu, Financials Menu, Reports Menu, and Admin Menu. Each sub-section lists various items with 'View' and 'Manage' permissions. A green arrow points from the 'Enable online access to this Facility' checkbox to this section.
- Facilities:** A list of facilities with checkboxes for selection. A green arrow points from the 'Enable online access to this Facility' checkbox to this list. The facilities listed are:
 - ☐ OR Larger Rec-WHSLR 1 | 060-X0001
 - ☒ OR Lofty Rec-Producer A | 020-X0001
 - ☐ OR Lofty Rec-Producer B | 020-X0002
 - ☐ OR Lofty Rec-Store 52 | 050-X0001
 - ☐ OR Lofty Rec-Store 56 | 050-X0002
 - ☐ OR Mishmash Rec-MFG X | 030-X0001
 - ☐ OR Perceptive Labs | 010-X0001Buttons: Check all, Check none.

Add Employees

- ▶ Clicking the blue plus button allows you to add multiple employees at the same time.
- ▶ When you have finished adding the employee simply hit the green “Create Employees” button at the bottom of the screen.



The screenshot shows a web form titled "Add Employees" with a close button (X) in the top right corner. The form is for "Employee # 1" and includes a "(clear)" button. It contains input fields for "First Name", "Last Name", and "Birthday" (with a "MMDDYY" placeholder). To the right of these fields is a list of checkboxes for facility access, including "OR Larger Rec-WHSLR 1 | 060-X0001", "OR Lofty Rec-Producer A | 020-X0001" (which is checked), "OR Lofty Rec-Producer B | 020-X0002", "OR Lofty Rec-Store 52 | 050-X0001", "OR Lofty Rec-Store 56 | 050-X0002", "OR Mishmash Rec-MFG X | 030-X0001", and "OR Perceptive Labs | 010-X0001". Below these are "Check all" and "Check none" buttons. There is also a checkbox for "Enable online access to this Facility". Under the "Employment" section, there are checkboxes for "Owner at this Facility" and "Manager at this Facility". A blue plus button is located below the employment section. A light blue box contains a "Please note:" section with text about email notifications and a "If online access is granted:" section with text about security settings. At the bottom, there are "Create Employees" and "Cancel" buttons. Two green arrows point from the text on the left to the blue plus button and the "Create Employees" button.

Add Employees [X]

Employee # 1 [clear]

First Name

Last Name

Birthday

☐ Enable online access to this Facility

Employment ☐ Owner at this Facility
☐ Manager at this Facility

☐ OR Larger Rec-WHSLR 1 | 060-X0001
☒ OR Lofty Rec-Producer A | 020-X0001
☐ OR Lofty Rec-Producer B | 020-X0002
☐ OR Lofty Rec-Store 52 | 050-X0001
☐ OR Lofty Rec-Store 56 | 050-X0002
☐ OR Mishmash Rec-MFG X | 030-X0001
☐ OR Perceptive Labs | 010-X0001

[Check all] [Check none]

[+]

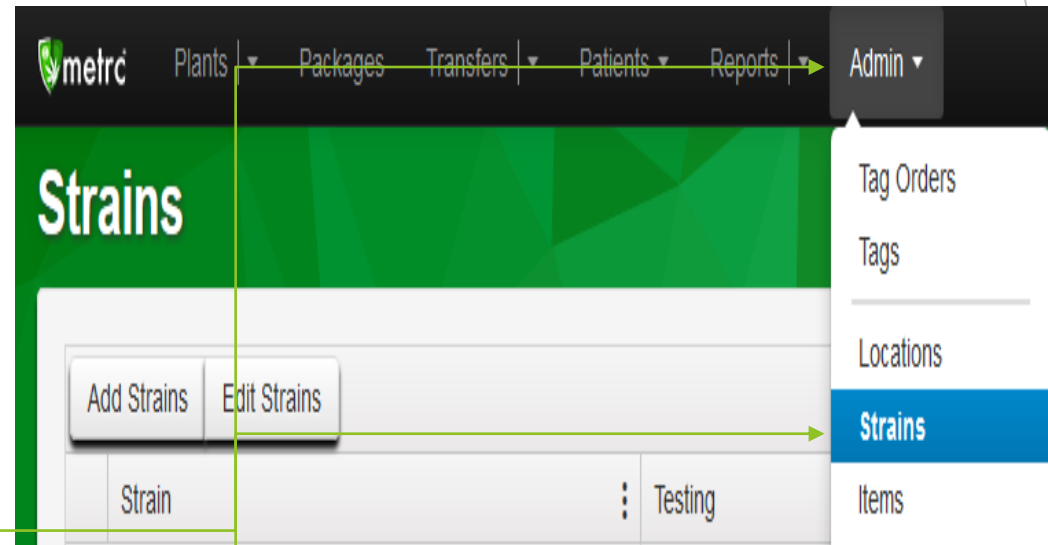
Please note:
All new employees granted online access via the "Enable online access to this Facility" checkbox above will receive an e-mail with instructions and a hyperlink to log directly into their User Profile.

If online access is granted:
Once logged in, the User will need to update their security settings. The e-mail will contain the User's Username, link expiration date/time, and the Metrc web address.

[Create Employees] [Cancel]

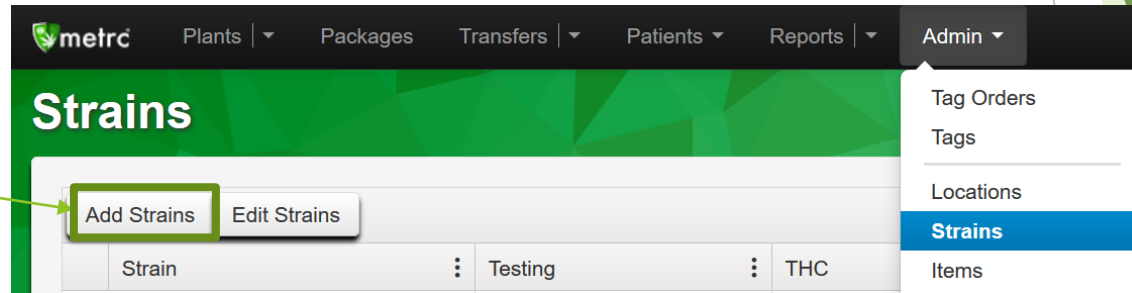
Add Strains

- ▶ After adding Employees the next step would be to add your strains to your list.
- ▶ Strains help separate different plants, items, products from each other.
- ▶ Many items in METRC are strain specific so you want to make sure your strains are easy for you to identify.
- ▶ Click the “Admin” tab
 - ▶ then select “Strains”



Add Strains

- ▶ Click the add Strains icon on the top left of the page
- ▶ This will open a new window allowing you to add strain information to the database
- ▶ Remember to add each strain separately that you intend to cultivate.



Add Strains

- ▶ Here you can enter the strain name
- ▶ Other fields are **for your own information and does not substitute for state-required compliance testing:**
 - ▶ Designate the testing status (In-House, None, or Third-Party)
 - ▶ Indicate the THC or CBD content of the strain
 - ▶ Select the percentage of Indica and/or Sativa
- ▶ If you operate multiple facilities you can add this strain to as many of those facilities as you wish.
- ▶ The blue “plus” Icon will allow you to add multiple strains at one time
- ▶ When you are finished click the “create strains” button to proceed.

The screenshot shows a web form titled "Add Strains" with a close button (X) in the top right corner. The form is for "Strain # 1" and includes a "(clear)" button. The fields are as follows:

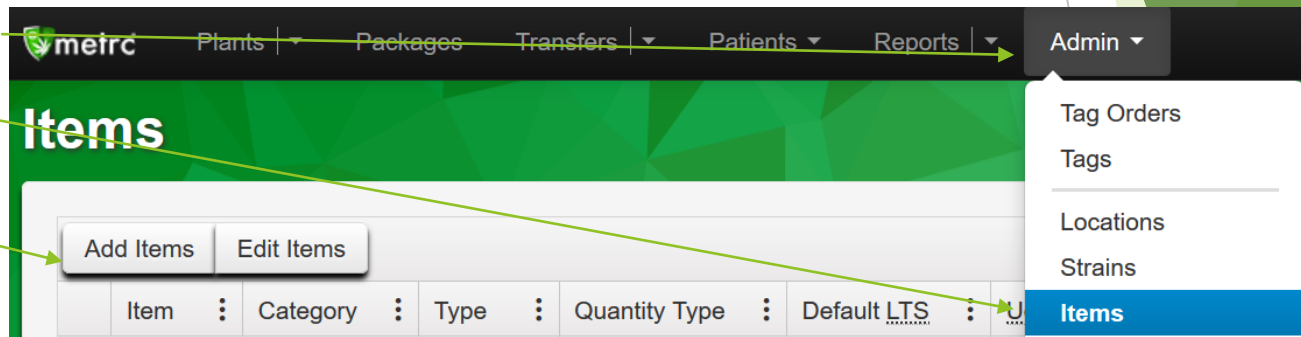
- Name:** A text input field with a green arrow pointing to it from the text "Here you can enter the strain name".
- Testing Status:** A dropdown menu currently showing "- Select -" with a green arrow pointing to it from the text "Designate the testing status (In-House, None, or Third-Party)".
- THC¹:** A text input field with a green arrow pointing to it from the text "Indicate the THC or CBD content of the strain".
- CBD:** A text input field with a green arrow pointing to it from the text "Indicate the THC or CBD content of the strain".
- Indica:** A slider control ranging from 0 to 100, currently set at approximately 75%, with a green arrow pointing to it from the text "Select the percentage of Indica and/or Sativa".
- Sativa:** A slider control ranging from 0 to 100, currently set at approximately 25%, with a green arrow pointing to it from the text "Select the percentage of Indica and/or Sativa".
- Facilities:** A list of checkboxes for various facilities, including "OR Larger Rec-WHSLR 1 | 060-X0001", "OR Lofty Rec-Producer A | 020-X0001", "OR Lofty Rec-Producer B | 020-X0002", "OR Lofty Rec-Store 52 | 050-X0001", "OR Lofty Rec-Store 56 | 050-X0002", "OR Mishmash Rec-MFG X | 030-X0001", and "OR Perceptive Labs | 010-X0001". A green arrow points to the "Check all" button below this list from the text "If you operate multiple facilities you can add this strain to as many of those facilities as you wish.".
- Buttons:** At the bottom, there is a blue "+" icon, a green "Create Strains" button, and a grey "Cancel" button. A green arrow points to the "Create Strains" button from the text "When you are finished click the 'create strains' button to proceed.".

A light blue informational box contains the following text:

Please report THC potency as a percentage of the overall weight.
This means that if a particular strain tested as having 15% THC potency, then every gram of dried flower of that strain has 0.15 grams of THC.
The reality is that potency can drastically change even between a single plant or from plant to plant. So, the percentage that should be entered into metro® would be the average potency percentage from all tests in the prior two years. If no tests have been conducted please use your best estimate.

Add Items

- ▶ To add an item click the “Admin” Tab and select “Items” from the list
- ▶ In the top left corner select the “add item” button to create a new item.
- ▶ Items are separated by category: Buds, Shake, Trim, Extracts, Edibles, etc.
 - ▶ You can name your items whatever you want, but they must be categorized as one of these item types.
 - ▶ OLCC’s “Product Categorization Guide” ([available here](#)) explains the various item categories.



Add Items

- ▶ Give your item a name
- ▶ Select the item category: Buds, Extract, etc.
- ▶ Select the unit of measure the item has (each, pounds, ounces, etc.)
- ▶ The blue “plus” button allows you to create multiple items at once.
- ▶ When finished click the “Create Items” button at the bottom.
- ▶ Items

The screenshot shows a web form titled "Add Items" with a close button (X) in the top right corner. The form contains the following elements:

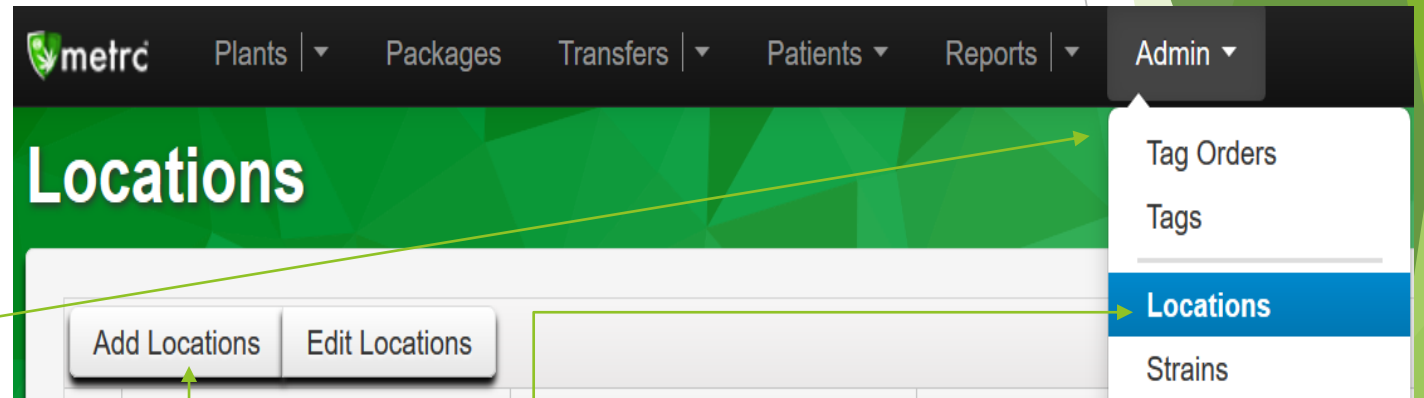
- Item # 1**: A label for the first item, with a red error message bubble below it stating "* This field is required".
- Name**: A text input field.
- Unit of Measure**: A dropdown menu.
- Category**: A dropdown menu currently showing "- Select -".
- + Button**: A blue button with a plus sign, located below the category dropdown.
- Information Box**: A light blue box containing the text: "Why is there no multi-Facility create such as that available in Employees, Strains, and Rooms? Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time."
- Create Items**: A green button at the bottom left.
- Cancel**: A grey button at the bottom right.

Green arrows from the list on the left point to the following fields:

- From "Give your item a name" to the **Name** input field.
- From "Select the item category: Buds, Extract, etc." to the **Category** dropdown.
- From "Select the unit of measure the item has (each, pounds, ounces, etc.)" to the **Unit of Measure** dropdown.
- From "The blue 'plus' button allows you to create multiple items at once." to the **+** button.
- From "When finished click the 'Create Items' button at the bottom." to the **Create Items** button.

Add Locations

- ▶ Marijuana Growers can add Locations to their facilities to help organize their inventory.
- ▶ At least 1 Location is required in METRC in order to begin recording inventory
- ▶ Click on the “Admin” tab and select “Locations”.
- ▶ Click on the “Add Locations” button on the top left



Add Locations

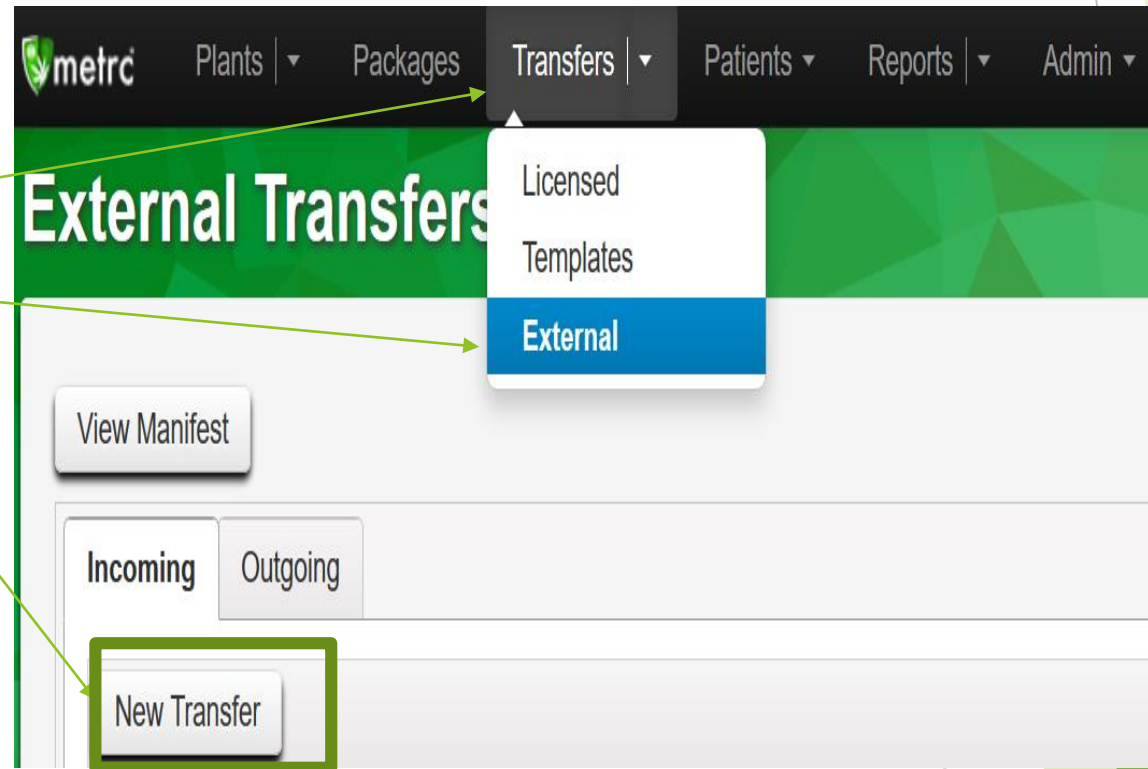
- ▶ Give the Location a name, Location names can be general (Flower Location A) or specific (Flower Location A, Table 1, Section I)
- ▶ The Location Type can designate whether the location is part of your indoor or outdoor grow sections of your grow site. Select the location type from the drop down menu.
- ▶ If you operate multiple grow sites you can apply the same Location name to each facility by checking the facility's box.
- ▶ The blue "Plus" button allows you to add multiple Locations at the same time
- ▶ Once you are finished filling inputting the data, click the "Create Locations" button to proceed.

The screenshot shows a web form titled "Add Locations" with a close button (X) in the top right corner. The form contains the following elements:

- Location # 1**: A text input field with a red error message bubble above it that says "* This field is required". A green arrow points from the first list item to this field.
- Name**: A text input field. A green arrow points from the first list item to this field.
- Location Type**: A dropdown menu currently showing "- Select -". A green arrow points from the second list item to this dropdown.
- Facility Selection**: Three checkboxes with labels:
- ☒ 0 NO STREET PORTLAND OR MULTNOMAH 97232 | 220-32555
- ☐ OR Lofty Rec-Producer A | 020-X0001
- ☐ OR Lofty Rec-Producer B | 020-X0002
Below these are "Check all" and "Check none" buttons. A green arrow points from the third list item to the "Check all" button.
- Plus Button**: A blue button with a white plus sign and the number "1" next to it. A green arrow points from the fourth list item to this button.
- Create Locations**: A green button at the bottom right. A green arrow points from the fifth list item to this button.
- Cancel**: A grey button next to the "Create Locations" button.
- Clear Button**: A blue button labeled "(clear)" in the top right of the form area.

Creating Initial Inventory in METRC

- ▶ Initial inventory is created using the “Incoming External Transfers”
- ▶ Click on “Transfers” and select “External”
- ▶ Then create a New Transfer



Creating Initial Inventory in METRC (for grow sites)

- ▶ Grow Sites: Select “Transfer from Medical Patient”

- ▶ Input the patient card number
- ▶ The Phone number must be 10 digits but can just be a generic phone number example: 503-555-5555
- ▶ Input the employee and vehicle information as N/A.
- ▶ The planned route should be N/A since we do not need this information

- ▶ Complete one New Incoming External Transfer for each Medical Patient with all plants and items belonging to the respective patient

- ▶ Press the Plus button to add additional items

- ▶ Click on Register Transfer to record entries

- ▶ Note: Clicking “Register Transfer” does not create tagged packages in your inventory; you must complete the External transfer to fully reconcile your inventory

The screenshot shows the 'New Incoming Transfer' form in the METRC system. The form is titled 'New Incoming Transfer' and has a close button (X) in the top right corner. It contains several sections for data entry:

- Type:** A dropdown menu set to 'Transfer from medical patient'.
- Patient Card Number:** A text input field containing '1234567'.
- Phone No.:** A text input field containing '503-555-5555'.
- Transporter:** A text input field containing '220-32959' with a search icon (Q) to its right.
- Employee ID:** A text input field containing 'N/A'.
- Driver's Name:** A text input field containing 'N/A'.
- Driver's Lic. No.:** A text input field containing 'N/A'.
- Phone No.:** A text input field containing '503-555-5555' with a '(use default)' link to its right.
- Planned Route:** A text input field containing 'N/A'.
- Vehicle Information:** A section with a '- Lookup -' dropdown and three text input fields: 'Vehicle Make' (N/A), 'Vehicle Model' (N/A), and 'License Plate' (N/A).
- Est. Departure:** A date and time picker set to '05/08/2020' and '08:27 AM'.
- Est. Arrival:** A date and time picker set to '05/08/2020' and '08:27 AM'.
- Package # 1:** A section with a text input field containing 'Purple Kush Plants', a search icon (Q), and a '(clear)' button.
- Quantity:** A text input field containing '6' and a unit dropdown menu set to 'Each'.
- Package Date:** A date and time picker set to '05/08/2020' and 'today'.
- Buttons:** At the bottom, there is a green 'Register Transfer' button and a grey 'Cancel' button.

Annotations with green arrows point to specific fields:

- An arrow points from the text 'Transfer from Medical Patient' to the 'Type' dropdown.
- An arrow points from the text 'Driver and Car information can be "N/A".' to the 'Vehicle Make' field.
- An arrow points from the text 'Planned Route N/A' to the 'Planned Route' field.
- An arrow points from the text 'Note: Clicking "Register Transfer" does not create tagged packages...' to the 'Register Transfer' button.

Creating Initial Inventory in METRC (for medical processors and dispensaries)

- ▶ Processors and Dispensaries: select “Approved ITR Start-Up Inventory”
- ▶ “OMMP Reg. Number” should be processor/dispensary’s METRC facility license number.
- ▶ Complete one New Incoming External Transfer with all inventory
- ▶ Click on Register Transfer to record entries
 - ▶ Note: Clicking “Register Transfer” does not create tagged packages in your inventory; you must complete the External transfer to fully reconcile your inventory.

New Incoming Transfer

Type: Approved ITR Start-up Inventory

OMMP Reg. Number: ABC123

Phone No.: +1-800-420-5555

Transporter: 020-X0001

X (Pending)

Employee ID: Pending

Driver's Name: X

Driver's Lic. No.: X

Phone No.: +1-800-420-5555 (use default)

Driver and Car information can be “virtual” or “X” for start-up inventory.

Vehicle Make: X

Vehicle Model: X

License Plate: X

Planned Route: Approved Inventory Transfer Request

Est. Departure: 01/29/2018 today

Est. Arrival: 01/29/2018 today

Package # 1: Seeds, Quantity 5, Each, Package Date 01/29/2018 today

Package # 2: Blue Dream Clones, Quantity 16, Each, Package Date 01/29/2018 today

Package # 3: Metr Bliss (ITR Mature), Quantity 3, Each, Package Date 01/29/2018 today

Package # 4: Golden Goat Buds, Quantity 4, Pounds, Package Date 01/29/2018 today

(package)

Register Transfer Cancel

Completing External Transfer

- To create tagged packages you must complete the pending incoming transfer by clicking the “complete” button and entering the required information.

Manifest	Origin	Type	Transporter	Driver	Vehicle Info	Pkg's	ETD	ETA	Received	
► 0000036601	1234567	Transfer from medical patient	220-32959 100 TEST GS WHITE CITY OR JACKSON 97503-1818	N/A	Make: N/A Model: N/A Lic. Plate: N/A	1	05/08/2020 08:27 am	05/08/2020 08:27 am		<div>Edit</div> <div>Complete</div> <div>Void</div>

Completing External Transfer

- ▶ After clicking complete a pop-up window will appear.

- ▶ You'll need to assign a package tag to the packages on the manifest.

- ▶ Next click on the magnifying glass icon next to "patient".

The screenshot shows a web application window titled "Complete Incoming Transfer". It contains several input fields for manifest and transporter information. At the bottom, there is a section for "Package # 1" and "Patient". A green arrow points from the text "assign a package tag" to the magnifying glass icon next to the "Package # 1" input field. Another green arrow points from the text "click on the magnifying glass icon next to 'patient'" to the magnifying glass icon next to the "Patient" input field. The "Patient" input field is currently empty and has a placeholder text "Type Patient Number...". The "Package # 1" input field contains the value "1A4FF0100000515000000016". The "Item" field is set to "Purple Kush Plants". The "Shipped Qty" is 6, and the "Receive Qty" is 6. The "Unit" is set to "ea". There is a "Reject" checkbox. At the bottom of the window are two buttons: "Complete Transfer" and "Cancel".

Complete Incoming Transfer			
Manifest	0000036601	Transfer Type	Transfer from medical patient
Origin Lic. No.	1234567	Origin Name	
Main Phone No.	503-555-5555	Mobile Phone No.	
Transporter Lic. No.	220-32959	Transporter Name	100 TEST GS WHITE CITY OR J.
Phone No. for Questions	503-555-5555		
Employee ID	N/A	Vehicle Make	N/A
Driver's Name	N/A	Vehicle Model	N/A
Driver's Lic. No.	N/A	License Plate	N/A
Package # 1	1A4FF0100000515000000016	Item	Purple Kush Plants
		Shipped Qty	6
			ea
			<input type="checkbox"/> Reject
		Patient	Type Patient Number...
		Receive Qty	6
			Each
<div>Complete Transfer Cancel</div>			

Completing External Transfer

- ▶ A pop up window will appear listing the patients associated with your grow site.

- ▶ The patient column is the Metrc generated patient number
- ▶ The registration no. column lists the OMMP card number associated with the patient followed by an “_” and then the name of that patient’s grower.
- ▶ You’ll need to match your OMMP Card numbers with the Metrc patient number. Click on the patient number, then click the “Select” button to assign the patient to the package.

Select

▼

☰

↓

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

◀ ◁ 1 ▶ ▷

Page 1 of 1

▶ ▷

20 rows per page

Viewing 1 - 12 (12 total)

Select

Cancel

Completing External Transfer

- ▶ Once the patient has been assigned to the transfer, click on the complete transfer button

- ▶ This will move the package into your active packages section of Metrc.

Complete Incoming Transfer

Manifest

0000036601

Transfer Type

Transfer from medical patient

Origin Lic. No.

1234567

Origin Name

Main Phone No.

503-555-5555

Mobile Phone No.

Transporter Lic. No.

220-32959

Transporter Name

100 TEST GS WHITE CITY OR J.

Phone No. for Questions

503-555-5555

Employee ID

N/A

Vehicle Make

N/A

Driver's Name

N/A

Vehicle Model

N/A

Driver's Lic. No.

N/A

License Plate

N/A

Package # 1

1A4FF0100000515000000016

Q

Item

Purple Kush Plants

Shipped Qty.

6

ea

☐ Reject

Patient

217725

Q

Receive Qty.

6

Each

Complete Transfer

Cancel

Tracking Grow Site Activity in Metrc

Creating Plantings from Packages

- ▶ To create plantings from the packages you've transferred in, click on packages, then click on Active. You'll see the package that you transferred in.

The screenshot shows the metrc web application interface. The top navigation bar includes 'Plants', 'Packages' (highlighted with a green box), 'Transfers', 'Patients', 'Reports', and 'Admin'. Below this is a green header with the word 'Packages'. A filter bar contains 'Active' (highlighted with a green box), 'On Hold', 'Inactive', and 'In Transit'. Below the filter bar is a row of action buttons: 'New Packages', 'Submit for Testing', 'Remediate', 'Create Plantings' (highlighted with a green box), 'New Transfer', 'Change Items', and 'Change Patients'. Below the buttons is a table with the following columns: Tag, Src. H's, Patient, Item, Category, Item Strain, and Quantity. The table contains one row with the following data: Tag: 1A4FF0100000515000000016, Patient: 217725, Item: Purple Kush Plants, Category: Immature Plants, Item Strain: Purple Kush, and Quantity: 6 ea. Below the table is a pagination bar showing 'Page 1 of 1' and '20 rows per page'. Green arrows point from the text in the first list item to the 'Packages' tab, the 'Active' filter, and the 'Create Plantings' button. A second list item points to the first row of the table.

Tag	Src. H's	Patient	Item	Category	Item Strain	Quantity
▶ 🔍 1A4FF0100000515000000016		217725	Purple Kush Plants	Immature Plants	Purple Kush	6 ea

- ▶ Click on the package and then click on "Create Plantings".

Creating Plantings from Packages

- ▶ A pop up window will appear. From here you will fill in the information associated with the immature plant batch.

- ▶ The package number will auto-populate with the package you selected.
- ▶ The quantity is the amount coming out of the package.
- ▶ The group name defaults to the package name. You can change it to a name that is easier to track at your facility.
- ▶ Plant types should be either clones or seeds, depending on how those plants started.
- ▶ Plant count should equal the quantity that you are pulling from the package.

The screenshot shows a software window titled "Create Plantings from Packages". It contains a form for "Planting # 1" with a "(clear)" button. The form is divided into two main sections. The left section contains fields for "Package" (with a search icon), "Quantity" (a numeric input set to 6 and a unit dropdown set to "Each"), "Group Name" (a text input containing "Patient 217725 Batch"), "Plants Type" (a dropdown menu set to "Clone"), and "Plants Count" (a numeric input set to 6). A status bar below these fields says "Unpackaging - new total will be 0 ea". The right section contains fields for "Strain" (a text input containing "Purple Kush"), "Patient" (a text input containing "217725"), "Planting Date" (a date picker set to "05/08/2020" with a "today" button), and "Unpackage Date" (a date picker set to "05/08/2020" with a "today" button). At the bottom of the window are two buttons: "Create Plantings" and "Cancel". Green arrows point from the text instructions on the left to specific fields in the form: from "The package number..." to the "Package" field, from "The quantity..." to the "Quantity" field, from "The group name..." to the "Group Name" field, from "Plant types..." to the "Plants Type" dropdown, and from "Plant count..." to the "Plants Count" field.

Create Plantings from Packages

Planting # 1 (clear)

Package 1A4FF0100000515000000016

Quantity 6 Each

Unpackaging - new total will be 0 ea

Group Name Patient 217725 Batch

Plants Type Clone

Plants Count 6

Strain Purple Kush

Patient 217725

Planting Date 05/08/2020 today

Unpackage Date 05/08/2020 today

+ 1

Create Plantings Cancel

Creating Plantings from Packages

- ▶ Choose a strain from your strain list.
- ▶ Make sure that the patient you select here matches the patient that you assigned it to during transfer.
- ▶ The planting date and package dates should be the same.
- ▶ Once all this is complete, click on “Create Plantings”.

The screenshot shows a web application window titled "Create Plantings from Packages". It contains a form for creating a new planting. The form is divided into several sections. The top section is labeled "Planting # 1" and has a "(clear)" button. Below this, there are fields for "Package" (with a search icon), "Quantity" (set to 6), and "Each" (set to "Each"). A note below these fields says "Unpackaging - new total will be 0 ea". The "Group Name" field is set to "Patient 217725 Batch". The "Plants Type" dropdown is set to "Clone". The "Plants Count" field is set to 6. To the right of these fields, there are two rows of date selection: "Planting Date" and "Unpackage Date", both set to "05/08/2020" with a "today" button. Above the "Planting Date" field, there are fields for "Strain" (set to "Purple Kush") and "Patient" (set to "217725"). At the bottom of the form, there is a "+ 1" button and a "Create Plantings" button (highlighted with a green box) next to a "Cancel" button. Green arrows point from the list items to the corresponding fields in the form: from "Choose a strain from your strain list." to the "Strain" field; from "Make sure that the patient you select here matches the patient that you assigned it to during transfer." to the "Patient" field; from "The planting date and package dates should be the same." to the "Planting Date" and "Unpackage Date" fields; and from "Once all this is complete, click on “Create Plantings”." to the "Create Plantings" button.

Finishing a Package

- ▶ Once a package is empty (has a quantity of 0) it can be finished in Metrc
- ▶ In the packages section click the “Finish” button
- ▶ Complete the required information (package tag and date) and click “Finish Packages”
- ▶ Once a package is finished the RFID tag may be physically discarded

The screenshot displays the Metrc interface for managing packages. At the top, there are tabs for 'Active', 'On Hold', 'Inactive', and 'In Transit'. Below these are several action buttons: 'New Packages', 'Submit for Testing', 'Remediate', 'Create Plantings', 'New Transfer', 'Change Items', 'Change Patients', 'Adjust', 'Change Notes', and 'Finish'. The 'Finish' button is highlighted with a green box and a green arrow pointing to it from the second bullet point of the list. Below the buttons is a table with columns: Tag, Src. H's, Patient, Item, Category, Item Strain, Quantity, Lab Testing, A.H., Date, and Rcv'd. The first row of the table shows a package with Tag '1A4FF0100000515000000016', Patient '217725', Item 'Purple Kush Plants', Category 'Immature Plants', Item Strain 'Purple Kush', Quantity '0 ea', Lab Testing 'NotRequired', A.H. 'No', and Date '05/08/2020'. Below the table, there is a pagination bar showing 'Page 1 of 1', '20 rows per page', and 'Viewing 1 - 1 (1 total)'. A green arrow points from the third bullet point of the list to the 'Finish Packages' dialog box. The dialog box has a title 'Finish Packages' and a close button. It contains a 'Package # 1' label and a '(clear)' button. Below this, there is a 'Package' field with the value '1A4FF0100000515000000016' and a search icon, and a 'Date Finished' field with the value '05/08/2020' and a 'today' button. At the bottom of the dialog box, there is a '+ 1' button and a 'Finish Packages' button, with a 'Cancel' button next to it.

Tag	Src. H's	Patient	Item	Category	Item Strain	Quantity	Lab Testing	A.H.	Date	Rcv'd
▶ Q 1A4FF01000005150000000016		217725	Purple Kush Plants	Immature Plants	Purple Kush	0 ea	NotRequired	No	05/08/2020	

Page 1 of 1 20 rows per page Viewing 1 - 1 (1 total)

Finish Packages

Package # 1 (clear)

Package 1A4FF01000005150000000016 Date Finished 05/08/2020 today

+ 1

Finish Packages Cancel

Changing the Growth Phase

- ▶ Once Plantings are created you are ready to move those clones into which ever growth phase they are currently in.
- ▶ Click on Plants
 - ▶ Select the Immature tab
 - ▶ Click on the “Change Growth Phase” button to change your clone plantings phase.

The screenshot shows the metrc web application interface. At the top is a navigation bar with the metrc logo and several menu items: Plants, Packages, Transfers, Patients, Reports, and Admin. The 'Plants' menu item is highlighted with a green box. Below the navigation bar is a green header with the word 'Plants' in white. Underneath the header is a row of tabs: Immature, Inactive, Vegetative, Flowering, On Hold, Inactive, Additives, Waste, Harvested, and On Hold. The 'Immature' tab is selected and highlighted with a green box. Below the tabs is a row of action buttons: Create Packages, Split Plantings, Rename, Change Strains, Change Patients, Change Growth Phase, and Destroy Plants. The 'Change Growth Phase' button is highlighted with a green box. Below the buttons is a table with columns: Group, Strain, Patient, Type, Plants, Tracked, Packaged, Harvested, Destroyed, and C. The table has one data row with the following values: Patient 217725, Purple Kush, 217725, Clone, 6, 0, 0, 0, 0, 1. Below the table is a pagination bar showing 'Page 1 of 1' and '20 rows per page'.

Group	Strain	Patient	Type	Plants	Tracked	Packaged	Harvested	Destroyed	C
Patient ▶ 217725 Batch	Purple Kush	217725	Clone	6	0	0	0	0	1

Changing the Growth Phase

- ▶ A pop up window will appear and you'll need to fill in the information requested.
 - ▶ Select the number of plants you are moving into the new growth phase.
 - ▶ Select your starting plant tag from your list of plant tags. The ending tag number will auto populate.
 - ▶ Select the growth phase it is moving into and the location in your facility that these plants will be.
 - ▶ Make sure to select the correct patient from the patient lists
 - ▶ Make sure to record the date these plants changed phase.
- ▶ Once all the information is filled in, click on "Change Phase".

Change Immature Plants Growth Phase

Plant Group # 1

(clear)

Group

Patient 217725 Batch

Q

Plants Count

6

Tags

6

Starting Tag

1A4FF0000000515000000073

Q

Ending Tag

1A4FF0000000515000000078

(tags optional)

New Phase

Vegetative

New Location

Flower Room

Patient

217725

Q

Change Date

05/08/2020

today

+

1

Change Phase

Cancel

Recording a Harvest

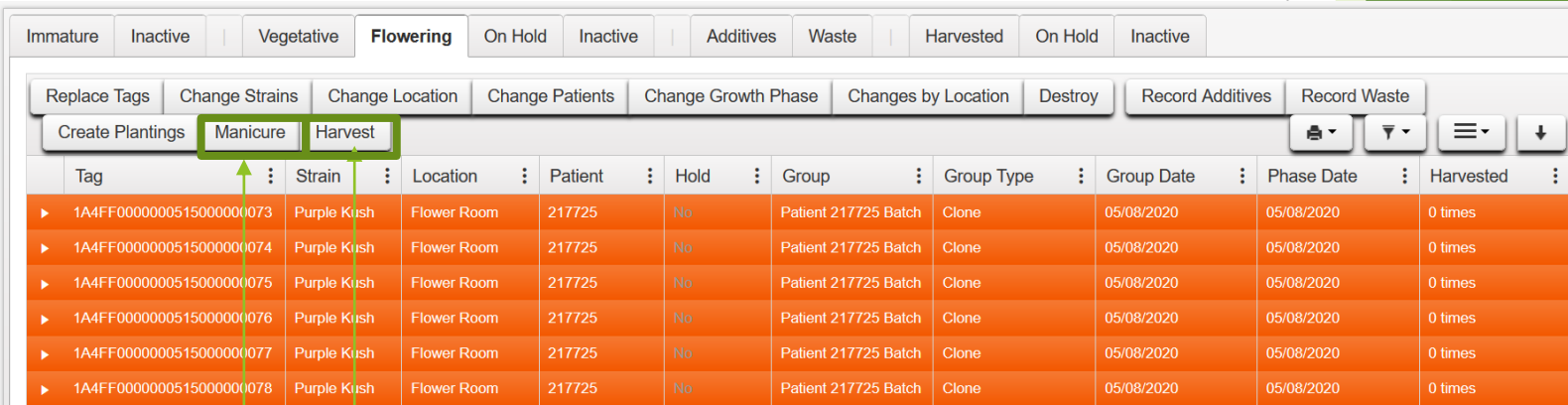
- ▶ Once your plants are ready for harvesting, you'll need to record the harvest in Metrc.

- ▶ To do so, go to your flowering plants tab. (Your plants will need have their growth phase changed to flowering before they can be harvested)

- ▶ Click and drag your mouse to select your plants and highlight them

- ▶ There are 2 different ways to harvest your plants:

- ▶ **Manicure:** Use this type of harvest if you are only harvesting part of the plant but leaving the plant alive and in the ground.
- ▶ **Harvest:** Use this type of harvest if you are harvesting the entire plant



Immature	Inactive	Vegetative	Flowering	On Hold	Inactive	Additives	Waste	Harvested	On Hold	Inactive
Replace Tags	Change Strains	Change Location	Change Patients	Change Growth Phase	Changes by Location	Destroy	Record Additives	Record Waste		
Create Plantings	Manicure	Harvest								
Tag	Strain	Location	Patient	Hold	Group	Group Type	Group Date	Phase Date	Harvested	
▶ 1A4FF0000000515000000073	Purple Kush	Flower Room	217725	No	Patient 217725 Batch	Clone	05/08/2020	05/08/2020	0 times	
▶ 1A4FF0000000515000000074	Purple Kush	Flower Room	217725	No	Patient 217725 Batch	Clone	05/08/2020	05/08/2020	0 times	
▶ 1A4FF0000000515000000075	Purple Kush	Flower Room	217725	No	Patient 217725 Batch	Clone	05/08/2020	05/08/2020	0 times	
▶ 1A4FF0000000515000000076	Purple Kush	Flower Room	217725	No	Patient 217725 Batch	Clone	05/08/2020	05/08/2020	0 times	
▶ 1A4FF0000000515000000077	Purple Kush	Flower Room	217725	No	Patient 217725 Batch	Clone	05/08/2020	05/08/2020	0 times	
▶ 1A4FF0000000515000000078	Purple Kush	Flower Room	217725	No	Patient 217725 Batch	Clone	05/08/2020	05/08/2020	0 times	

Recording a Harvest

- ▶ Using the template at the top you can save time in assigning information to the harvest.
 - ▶ Give the harvest a name that easily identifies who the harvest is for.
 - ▶ Give the harvest a unit of measure, whichever one you use for your operations.
 - ▶ Select a location at your facility where the harvest will be drying.
 - ▶ Select a patient from your patient list. Make sure it's the same patient these plants were assigned to.
 - ▶ Select the harvest date.
- ▶ Once the template is filled in, click on the green check boxes next to each field and the corresponding fields below will be auto filled in.

The screenshot shows a web application window titled "Harvest Flowering Plants". At the top is a "Template" section with a green header. It contains fields for "Harvest Name" (with a green checkmark), "Unit of Measure" (set to "Grams" with a green checkmark), "Drying Location" (set to "Dry Room" with a green checkmark), "Patient" (set to "217725" with a green checkmark), and "Harvest Date" (set to "05/08/2020" with a green checkmark). Below the template are three sections for individual plants, labeled "Plant # 1", "Plant # 2", and "Plant # 3". Each plant section has a minus sign button in the top right corner. Each section contains fields for "Plant" (ID), "Harvest Name", "Weight", "Drying Location", "Patient", and "Harvest Date". The "Harvest Name" field in each plant section is pre-filled with "Purple Kush Patient 1 2020". The "Plant" field is pre-filled with a long alphanumeric string. The "Weight" field is pre-filled with "ex. 100.23". The "Drying Location" is pre-filled with "Dry Room". The "Patient" is pre-filled with "217725". The "Harvest Date" is pre-filled with "05/08/2020".

Harvest Flowering Plants

Template

Harvest Name ✓

Unit of Measure ✓

Drying Location ✓

Patient ✓

Harvest Date today ✓

Plant # 1

Plant

Harvest Name

Weight

Drying Location

Patient

Harvest Date today

Plant # 2

Plant

Harvest Name

Weight

Drying Location

Patient

Harvest Date today

Plant # 3

Plant

Harvest Name

Weight

Drying Location

Patient

Harvest Date today

Recording a Harvest

- ▶ The only thing you have to manually enter on the harvest screen is the wet weight of each plant being harvested.
 - ▶ You will need to record the exact wet weight of each plant being harvested.
 - ▶ Make sure you are recording the wet weight of the plant. This means before any drying or trimming has been done.
- ▶ Once the weights are recorded, click on the green “Harvest Plants” button.

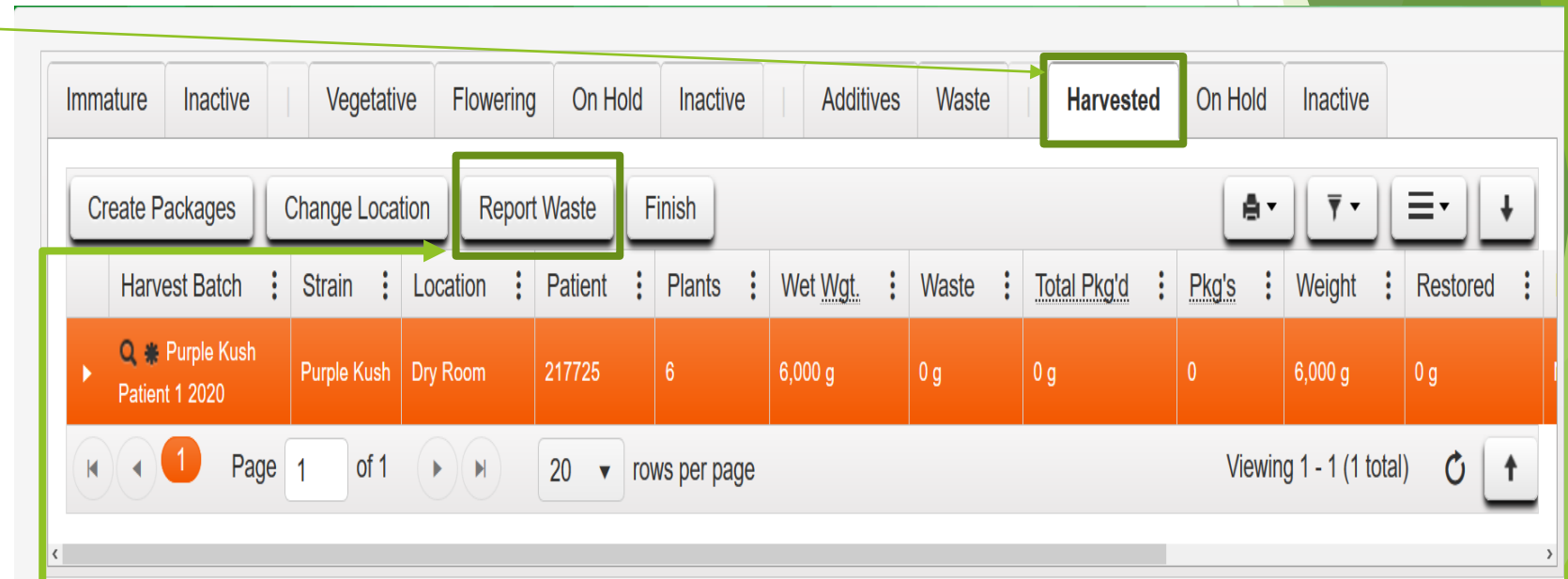
The screenshot displays a software interface for recording harvest data. It features three sections, each for a different plant, labeled 'Plant # 4', 'Plant # 5', and 'Plant # 6'. Each section contains the following fields: 'Plant' (with a unique ID and a search icon), 'Harvest Name (optional)' (with the text 'Purple Kush Patient 1 2020'), 'Weight' (a numeric input set to 1000 and a unit dropdown set to Grams), 'Drying Location' (a dropdown set to 'Dry Room'), 'Patient' (a dropdown set to '217725'), and 'Harvest Date' (a date picker set to '05/08/2020' and a 'today' button). A green box highlights the 'Weight' field in the 'Plant # 4' section, with a green arrow pointing from the first bullet point of the text on the left. At the bottom of the interface, there is a green '+ 1' button and a green 'Harvest Plants' button, which is also highlighted with a green box and a green arrow pointing from the third bullet point of the text on the left. A 'Cancel' button is located next to the 'Harvest Plants' button.

Plant #	Plant ID	Harvest Name (optional)	Weight	Unit	Drying Location	Patient	Harvest Date
Plant # 4	1A4FF0000000515000000076	Purple Kush Patient 1 2020	1000	Grams	Dry Room	217725	05/08/2020
Plant # 5	1A4FF0000000515000000077	Purple Kush Patient 1 2020	1000	Grams	Dry Room	217725	05/08/2020
Plant # 6	1A4FF0000000515000000078	Purple Kush Patient 1 2020	1000	Grams	Dry Room	217725	05/08/2020

At the bottom, there is a green '+ 1' button and a green 'Harvest Plants' button, with a 'Cancel' button next to it.

Recording Waste against a Harvest

- ▶ Once you've harvested, you'll eventually need to record waste and package up your harvest. Click on the "Harvested" tab under plants.



Harvest Batch	Strain	Location	Patient	Plants	Wet Wgt.	Waste	Total Pkg'd	Pkg's	Weight	Restored
▶ Q * Purple Kush Patient 1 2020	Purple Kush	Dry Room	217725	6	6,000 g	0 g	0 g	0	6,000 g	0 g

- ▶ Waste should only be recorded as the trimmed plant waste from the harvest, not the weight that is lost during drying.
- ▶ Click on the harvest batch and then click on "report waste".

Recording Waste against a Harvest

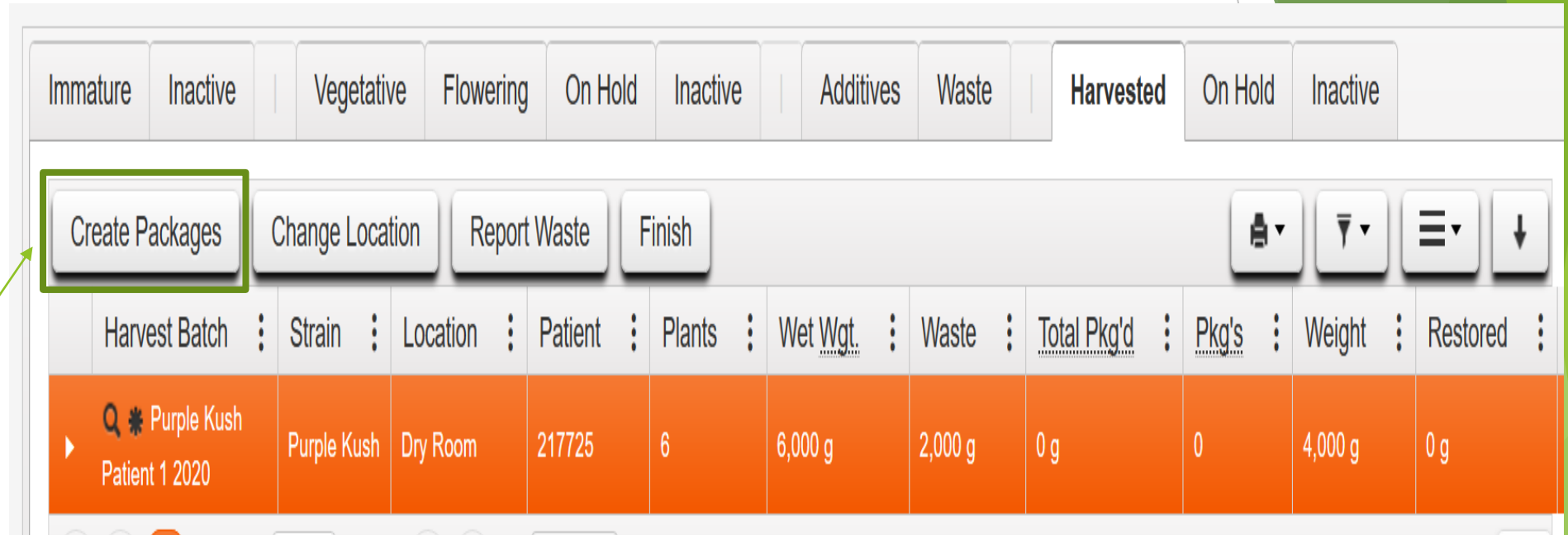
- ▶ When the waste window pops up you can then record the amount of physical waste that is being removed from the harvest.
 - ▶ The waste type will always be “plant material”
 - ▶ The waste date should reflect the date the waste was created.
- ▶ Once everything is entered hit the “report waste” button.

The screenshot shows a 'Report Waste' window with the following elements and annotations:

- Batch # 1**: Located at the top left of the form area.
- (clear)**: A blue button at the top right of the form area.
- Batch**: A dropdown menu containing 'Purple Kush Patient 1 2020' with a magnifying glass icon to its right. A green box highlights this field, and a green arrow points from the first bullet point to it.
- Weight**: A numeric input field with '2000' and a unit dropdown set to 'Grams'. A green box highlights this field.
- Removing**: A black button with white text. Below it, a status message reads '- new total will be 4,000 g'.
- Waste Type**: A dropdown menu set to 'Plant Material'. A green box highlights this field, and a green arrow points from the second bullet point to it.
- Waste Date**: A date picker showing '05/08/2020' and a 'today' button. A green box highlights this field, and a green arrow points from the third bullet point to it.
- + 1**: A blue button with a plus sign and a numeric input field with '1'.
- Report Waste**: A green button at the bottom center, highlighted with a green box. A green arrow points from the fourth bullet point to it.
- Cancel**: A grey button at the bottom right.

Creating Packages from a Harvest

- ▶ You'll next need to package your usable marijuana for patients
 - ▶ Click on the harvest batch and then click on the "Create Packages" button.



The screenshot shows a software interface for managing cannabis harvests. At the top, there are tabs for different stages: Immature, Inactive, Vegetative, Flowering, On Hold, Inactive, Additives, Waste, **Harvested**, On Hold, and Inactive. Below the tabs is a row of action buttons: **Create Packages** (highlighted with a green box), Change Location, Report Waste, and Finish. To the right of these buttons are four icons: a printer, a funnel, a menu, and a download arrow. Below the buttons is a table with the following columns: Harvest Batch, Strain, Location, Patient, Plants, Wet Wgt., Waste, Total Pkg'd, Pkg's, Weight, and Restored. The first row of data is highlighted in orange and contains the following information:

Harvest Batch	Strain	Location	Patient	Plants	Wet Wgt.	Waste	Total Pkg'd	Pkg's	Weight	Restored
Q* Purple Kush Patient 1 2020	Purple Kush	Dry Room	217725	6	6,000 g	2,000 g	0 g	0	4,000 g	0 g

Creating Packages from a Harvest

- ▶ You'll next need to fill out the information for the package you are creating.
 - ▶ Select the package tag you are assigning to the package.
 - ▶ Select your Item
 - ▶ The quantity will automatically be calculated once you create the package.
 - ▶ Make sure to assign it to the same patient the harvest was assigned to.
 - ▶ You can record an optional note against the package.
 - ▶ Select the date you created the package.
 - ▶ Do not Check the production batch box.

Create Packages

New Package # 1

New Tag: 1A4FF0100000515000000017

Item: Purple Kush Buds

Quantity: Calculated Grams

Patient: 217725

Note:

Package Date: 05/08/2020 today

☐ Production Batch

Harvest # 1 Purple Kush Patient 1 2020

Quantity: 1500 Grams

Packaging - new total will be 2,500 g

(contents)

Create Packages **Cancel**

Creating Packages from a Harvest

- ▶ Next, record the quantity you are pulling from the harvest batch to put into the package.
- ▶ Once you've finished filling out this information click on the "Create Packages" button.

The screenshot shows the 'Create Packages' window. A green box highlights the 'Harvest # 1' section, which includes a search field with 'Purple Kush Patient 1 2020', a 'Quantity' field with '1500', a unit dropdown set to 'Grams', and a 'Packaging' status showing '- new total will be 2,500 g'. A green arrow points from the first list item to this box. Another green box highlights the 'Create Packages' button at the bottom, with a green arrow pointing from the second list item to it. The main form contains fields for 'New Tag' (1A4FF0100000515000000017), 'Item' (Purple Kush Buds), 'Quantity' (Calculated), 'Grams', 'Patient' (217725), 'Note', 'Package Date' (05/08/2020), and a 'Production Batch' checkbox. A '(clear)' button is in the top right, and a '(contents)' button is below the harvest section.

Finishing a Harvest

- ▶ Once you've recorded all physical waste and packages, you'll still have some weight left over in the harvest batch.

- ▶ This is expected. This weight will be recorded as moisture loss once the harvest is finished.

- ▶ Click on the harvest batch to select the harvest

- ▶ Then click on "Finish".

Immature	Inactive	Vegetative	Flowering	On Hold	Inactive	Additives	Waste	Harvested	On Hold	Inactive
Create Packages	Change Location	Report Waste	Finish							
Harvest Batch	Strain	Location	Patient	Plants	Wet Wgt.	Waste	Total Pkg'd	Pkg's	Weight	Restored
Q * Purple Kush Patient 1 2020	Purple Kush	Dry Room	217725	6	6,000 g	2,000 g	1,500 g	1	2,500 g	0 g
◀	1	Page 1 of 1	▶	20	rows per page			Viewing 1 - 1 (1 total)	↺	↻

Finishing a Harvest

- ▶ When the Finish harvest pop up window appears, fill in the Date the harvest was finished.

- ▶ All activity associated with a harvest must be recorded within 45 days of the harvest date.

- ▶ Once the date is recorded click on “Finish Harvests”.

The screenshot shows a 'Finish Harvests' window with the following elements:

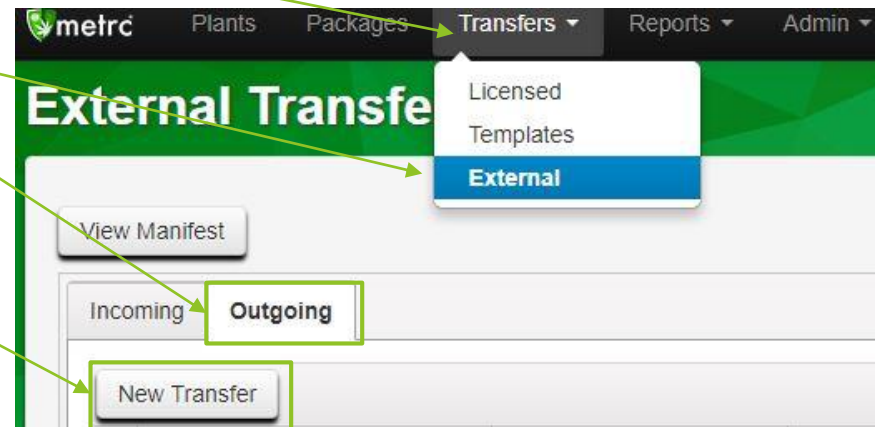
- Harvest # 1**: A label at the top right of the main section with a '(clear)' button next to it.
- Harvest ***: A label next to a text input field containing 'Purple Kush Patient 1 2020' and a search icon.
- Date Finished**: A date picker showing '05/08/2020' and a 'today' button.
- Count**: A blue '+' button, a text box with '1', and a dropdown arrow.
- Buttons**: A green 'Finish Harvests' button and a grey 'Cancel' button at the bottom.

Green arrows and boxes highlight the following actions:

- An arrow points from the text 'fill in the Date the harvest was finished.' to the 'Date Finished' date picker.
- A box surrounds the 'Date Finished' date picker.
- An arrow points from the text 'click on “Finish Harvests”.' to the 'Finish Harvests' button.
- A box surrounds the 'Finish Harvests' button.

Transfers Out to Patients

- ▶ 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



Transfers Out to Patients

- ▶ Select the “Transfer to medical patient” transfer type.
- ▶ Fill in the OMMP Card Number.
- ▶ Fill in your phone number.
- ▶ The planned route can be listed as N/A unless the transfer is being delivered to the medical patient’s residence.
 - ▶ You’ll instead need to fill in the route details.
- ▶ Select the package of usable Marijuana for that patient.
- ▶ Fill in the estimated Departure and Arrival dates/times reflecting when the patient received the package.
- ▶ Click on the “Register Transfer” Button.

New Outgoing Transfer

Type: Transfer to Medical Patient (Medica)

Destination 1 (clear)

OMMP Card Number: 1234567

Phone No.: 503-555-5555

Planned Route: N/A

Package # 1 1A4FF0100000515000000017 (clear)

(package)

(destination)

Est. Departure: 05/08/2020 today 01 : 22 PM

Est. Arrival: 05/08/2020 today 01 : 22 PM

Register Transfer Cancel

Transfers out to Patients

Incoming

Outgoing

New Transfer

	Manifest	Transporter	Driver	Vehicle Info	Destination	Stops	Pkg's	Employee	Date Created	
▶	0000036701	N/A N/A		Make: Model: Lic. Plate:	1234567 ()	1	1	Testing Three	05/08/2020 01:30 pm	<div>Edit Complete Void</div>

- ▶ Once you've registered the outgoing transfer, the final step will be to complete the transfer.
 - ▶ This is a check to make sure that what you've given to the patient is accurately recorded in Metrc.
- ▶ Click on the Complete button in the far right column.

Transfers out to Patients

- ▶ When you click complete, a pop up window will appear.

Complete Outgoing Transfer [X]

Manifest	0000036701	Transfer Type	Transfer to Medical Patient (Medi
Origin Lic. No.	220-32959	Origin Name	100 TEST GS WHITE CITY OR J
Main Phone No.	5555555555	Mobile Phone No.	
Phone No. for Questions			
Employee ID		Vehicle Make	
Driver's Name		Vehicle Model	
Driver's Lic. No.		License Plate	
Package # 1	1A4FF0100000515000000017	Item	Purple Kush Buds
		Shipped Qty.	1500 g <input type="checkbox"/> Reject
		Receive Qty.	1500 Grams

Complete Transfer **Cancel**

- ▶ Confirm the information is accurate.

- ▶ Once confirmed, click on "Complete Transfer".

Contact Information

- ▶ Metrc support desk
 - ▶ Can help with questions about specific Metrc functionality (“how do I create a harvest in Metrc?”)
 - ▶ (877) 566-6506
 - ▶ support@metrc.com
- ▶ Oregon Health Authority
 - ▶ Can help with questions specific to the status of your or a patient’s registration, whether you need to be tracked in CTS (Metrc), assistance with the OMMOS system, and rules specific to medical registrants (“how many plants can I grow at my grow site?”)
 - ▶ (971) 673-1234
 - ▶ ommp.info@dhsosha.state.or.us
 - ▶ <http://healthoregon.org/ommp>
- ▶ Oregon Liquor Control Commission
 - ▶ Can help with questions related to medical tracking rules or the 20 pound transfer from grow sites into the OLCC system (“how do I register for the 20 lb transfer?”)
 - ▶ (503) 872-5000
 - ▶ marijuana.cts@Oregon.gov
 - ▶ <https://www.oregon.gov/olcc/marijuana/Pages/OMMPCTS.aspx>
 - ▶ <https://wiki-or.metrc.com>