



# **Industry User's Guide California Supplemental**

Rev 20.4

## **California Cannabis Track-and-Trace System**

This user guide describes how California industry participants are intended to use the CCTT-Metrc system consistent with state statutes and regulations. Please refer to the California Transition Period Guide for information about how annual licensees should use the system to enter any existing inventory at the time of annual licensure and how to transfer cannabis and cannabis products to/from temporary licensees.

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## **1 Introduction**

The California Cannabis Track-and-Trace Metrc system is used by Industry businesses to record events throughout the life cycle of cannabis plants and products. This User's Guide contains instructions that incorporate California's specific configurations and proper use. The Metrc system has additional functionality that is generic to all states and is not incorporated into this California specific guide. Additional instructions for use of Metrc to record business events can be found in the Metrc Industry User Guide.

## **2 First-Time Credentialing and Business Setup**

### **2.1 Initial Business Setup Process**

The Metrc Support Team has created a step-by-step process so licensees capture all the necessary requirements and information in Metrc. Setting up a facility in Metrc follows a logical process designed around the common business practices of the cannabis industry. When setting up a Metrc system, it is important to follow this process to minimize data input and maximize accuracy. Remember, all information created in Metrc is in a live system and subject to review by the State. The following steps define the process for setting up a business in Metrc.

1. Follow the first-time credentialing and user profile creation processes described in Sections 2.2 through 2.4 below.
2. Order tags.
3. For each facility add:
  - A. Employees (including owners and managers)
  - B. Strains
  - C. Locations
  - D. Items
4. When tags arrive, receive them in Metrc before entering plants and/or packages.



## 2.2 Account Manager Credentialing

During the licensing process, an owner, designated responsible party (DRP), primary contact, or other representative authorized to act on behalf of the licensee is identified as the Metrc Account Manager.

The Account Manager must attend the Account Manager New Business training hosted by the Metrc Support Team before accessing Metrc. Once this training is completed and an annual license is issued, the Account Manager sends an email to support@metrc.com or calls Metrc Support (877-566-6506) to initiate the credentialing process and enable Metrc access.

After the Account Manager information is validated, he/she receives a *Welcome to Metrc* email similar to the one shown in Exhibit 1.



Exhibit 1: The Welcome to Metrc Email

The *Welcome to Metrc* email provides a link and temporary password for logging into Metrc and setting up an account.

**NOTE: The first time log-in link is only good for 24 hours, so login within 24 hours of receiving the email. If the log-in link expires, use the *Expired First-Time Log-in Link*. If you no longer have the *Welcome to Metrc* e-mail, contact Metrc Support (877-566-6506) to request that the e-mail be resent.**

1

## Username

Your username:

The *Username* is based on the email address sent during credentialing (for Account Managers) or the account creation process (for employees). It is used to log into Metrc after the initial log-in.

2

## First-Time Log-in Link

Log-in and set your password here

Clicking the *First-Time Log-in Link* displays the initial login page pre-populated with the *First-Time Log-in Key* and the user *E-mail* address. Clicking the *Log in* button navigates the user first to the *End User Agreements* page and then to the *User Profile* page to set up security information.

Exhibit 2: The First-Time Log-in Page

3

## First-Time Log-in Key

First Time log-in key:

This is a temporary First-Time Log-in Key and can only be used once.



The *First-Time Log-in Link* and *First-Time Log-in Key* will remain active for 24 hours. After 24 hours, use the *Expired First-Time Log-in Link* (see below). If you no longer have the *Welcome to Metrc* e-mail, contact Metrc Support (877-566-6506) to request that the e-mail be resent.

4

**Expired First-Time Log-in Link**

If the link above expires, [click here](#) to use the Password Reset form.

*Expired First-Time Log-in Link* is used for the initial log-in when the *First-Time Log-in Link and Key* expire after 24 hours.

5

**Ongoing Log-in Link**

<https://ca.metroc.com/>

*Ongoing Log-in Link* is the link used to access Metrc after the first-time login to set-up the *User Profile* and *Password*. It is suggested that this link be added to your Favorites for convenient access.

## 2.3 End User Agreements

After the *Log-in* button has been selected on the first-time log-in page, the California and Metrc User Agreements shown in Exhibit 3 display. The Account Manager or employee will not be able to gain access to the Metrc system without agreeing to both the agreements.

### END USER AGREEMENTS

**EACH USER MUST ATTEST to the “CONDITIONS OF USE AND PRIVACY POLICY FOR USE OF THE CALIFORNIA CANNABIS TRACK-AND-TRACE SYSTEM” AND MUST ACCEPT THE “METRC SYSTEM – TERMS AND CONDITIONS” PRIOR TO ACCESSING THE SYSTEM.**

----- CALIFORNIA USER AGREEMENT -----

**CONDITIONS OF USE AND PRIVACY POLICY FOR USE OF THE CALIFORNIA CANNABIS TRACK-AND-TRACE SYSTEM**

**NOTICES**

The California Cannabis Track-and-Trace (CCTT) system is for legal and authorized use only. Unauthorized access, attempted access, or use of this system is a violation of Section 502 of the California Penal Code and/or other applicable state and federal laws, and may be subject to prosecution.

Each time you log into our secure services on the CCTT system, you are acknowledging that you have read, understand and accept our Conditions of Use and Privacy Policy, and that you are an authorized user of the account services.

When accessing the system, you agree to use only your own username and password. You are responsible for protecting

Exhibit 3: California and Metrc User Agreements

## 2.4 User Profile Creation

Once the terms and conditions of the End User Agreements have been accepted, the Account Manager or employee is directed to the *User Profile* shown in Exhibit 4.

The screenshot shows the 'User Profile' page with the following fields and callouts:

- 1** Full Name
- 2** Username / E-mail
- 3** Phone Number
- 4** Username
- 5** Password
- 6** Confirm Password
- 7** Security Question
- 8** Security Answer
- 9** Save Profile Button
- 10** Undo Changes Button

Exhibit 4: The User Profile Page

Complete the *User Profile* shown in Exhibit 4 by creating and confirming a password and providing a security question and answer before selecting the *Save Profile* button.

After the initial login to Metrc, users can access their *User Profile* from the *User* menu at any time to update contact information and update password security.

1

### Full Name

Full Name John Jones

This field is auto-populated during the account creation and credentialing process.

2

### Username / E-mail

Username / E-mail

This field is auto-populated during the account creation and credentialing process. The email address can be changed here, and the *Username* will be updated to the same value.

3

### Phone Number

Phone Number +1-123-456-7890

Use this field to enter or change the contact phone number here.

4

**Username****Username** john.jones@cannabisfarms.com

Username is set based on the email address provided during the account creation and credentialing process and is synchronized with the E-mail address when the E-mail address is updated on the User Profile.

5

**Password**Password 

Passwords can be created or changed here.

Passwords must contain, at least:

- One (1) upper case letter
- One (1) lower case letter
- One (1) number, and
- One (1) special character (\$#!@&)

6

**Confirm Password**Confirm Password 

Confirm the password when creating it and changing it here.

7

**Security Question**Security Question 

Create a security question that can be used to log into Metrc in case of a forgotten password.

8

**Security Answer**Security Answer ☐ View Security Answer

Provide the answer to the security question here. Select the *View Security/Answer* checkbox to unhide and verify the answer before saving it.

9

**Save Profile Button**

Select this button to save all information entered into the *User Profile* during the current session.

10

**Undo Changes Button**A rectangular button with a light gray background and a thin black border. The text "Undo Changes" is centered on the button in a black, sans-serif font.

Only select this button to clear all information entered into the *User Profile* during the current session.

## 2.5 Employee Credentialing

A licensee's Account Manager creates accounts and grant permissions for employees and owners to use Metrc. However, only employees requiring access to Metrc to do their jobs should be given accounts. Each employee should only be granted the minimum permissions required for his/her job. The Account Manager designated by the licensee is responsible for training all employees granted access to Metrc on the proper and lawful use of the system.

**NOTE: The Account Manager is responsible for the accuracy of all data recorded in the California Cannabis Track-and-Trace (CCTT) by their Metrc system users.**

The Account Manager must have the employee's full name and email address in order to create user accounts. The account creation process generates a *Welcome to Metrc* email for each new user. Using the links and information provided in the *Welcome to Metrc* email, new employee users initiate the first-time log-in and follow the account creation steps described in Sections 2.2 Account Manager Credentialing through 2.4 User Profile Creation above.

When adding an employee, it will be necessary to add permissions for the function(s) that the employee will use to perform tasks in the Metrc system. Employee permissions include:

- **Administration** – Provides the capability to perform all administrative functions, including ordering tags, setting up strains, locations, and items, and adding employees (it is recommended that the number of users granted administrative permissions be limited).
- **Plants** – Provides the capability to create plantings, move plants, change growth phase, log waste, and create harvests in Metrc.
- **Packages** – Provides the capability to create, adjust, and re-package packages into smaller or larger quantities, as well as create packages of production batches.
- **Transfers** – Provides the capability to create, modify, void, and receive/reject transfers.
- **Transfer Hub** – Provides the capability to view a manifest, edit transporter information, and record actual departure, arrival, layover check-in, and layover check-out dates/times.
- **Sales** – Provides the capability to input sales data or initiate sales uploads.
- **Reports** – Provides the capability to generate pre-defined reports.

Additional notes:

- Be sure to enter a valid, unique email address so the employee receives the *Welcome to Metrc* email. If the email address was previously entered in Metrc for



an employee of the same licensee or a different licensee, the employee will not receive the *Welcome to Metrc* email. Instead, the employee will receive an *Access Granted to Metrc Facility* email which lets them know they have been granted access to the license.

- The employee *Welcome to Metrc* email link expires in 24 hours.
- If a new employee fails to log-in within the 24 hours or does not receive the *Welcome to Metrc* email, the Account Manager can edit the employee record and select the *Resend Welcome Email* checkbox to resend the email containing the temporary log-in information. If the *Resend Welcome Email* checkbox is unavailable, this indicates that the employee previously logged into Metrc and set-up a password on their *User Profile*. If the employee does not remember their password, instruct them to use the password reset link on the Metrc login page.
- The permissions granted to each employee determine which menus are displayed in the Metrc toolbar for that user and whether they can view or update the information.
- The home page selection is the first page an employee sees after successful login. This is where the employee will typically begin his/her work.

## 2.5.1 Add Employee

**Add Employees**

Employee # 1 (clear)

First Name

Last Name

Enable Online Access Checkbox ☒ Enable online access to this Facility

E-mail

Phone Number

Home Page Drop-Down

Employment ☐ Owner at this Facility  
☐ Manager at this Facility  
☐ Employee

**Permissions**

**Packages Page**  
Grids (req'd) ☐ View  
Inventory ☐ Manage  
Create/Submit/Disc. ☐ Manage

**Transfers Menu**  
Licensed & External ☐ Manage  
Templates ☐ Manage  
Hub ☐ Manage

**Financials Menu**  
All ☐ Manage

**Reports Menu**  
All ☐ View

**Admin Menu**  
Tag Orders ☐ Manage  
Tags ☐ Manage  
Strains ☐ Manage  
Items ☐ Manage  
Employees ☐ Manage

☒ Cannabis Connection | A11-0000002-LIC  
☐ Cannabis Creations | CDPH-0000003  
☐ Cannabis Farms | CML17-0000001  
☐ Cannabis Microbusiness | A12-0000015-LIC  
☐ Cannabis Processing | CAL17-0000005  
☐ Cannabis Sales | M10-0000004-LIC  
☐ Cannabis Science | 008-0000010-LIC  
☐ Cannabis Transport | M13-0000010-LIC

**Add Button**

**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.

**11** Create Employees Button **12** Cancel Button

**13** Clear Button **8** Permissions **9** Facilities

Exhibit 5: The Add Employee Page

1

### First Name

First Name

Enter the first name of the employee.

2

### Last Name

Last Name

Enter the last name of the employee.

3

### Enable Online Access checkbox

☒ Enable online access to this Facility

Use this checkbox to grant the employee online access for the current facility. This checkbox will normally be checked for all employees.

4

**Email**

E-mail

This is the email address where the *Welcome to Metrc* email containing log-in credentials will be received. It will also be used as the employee Username.

5

**Phone Number**

Phone Number

+1-123-456-7890

Enter the phone number of the employee.

6

**Home**

Home

- Select Home -



Select the *Home* page that should be displayed for the employee upon login based on job duties. This is where the employee will typically begin his/her work. It does not affect an employee's ability to navigate from page to page.

7

**Employment**

Employment

☐ Owner at this Facility☐ Manager at this Facility☐ Employee

Identify the role at the facility (owner, manager, or employee). Permissions are not set by this option (see below).

8

**Permissions**

Permissions

The Account Manager grants permissions to each employee (including owners and managers) based on job duties. These permissions can be edited by the Account Manager as needed.

Select each checkbox to grant access to Metrc pages and menus. These vary according to facility type. For example, Retailers have sales permissions that Cultivators do not have. Examples include:

- Plants page
- Packages page
- Transfers page

- Transfers Hub page
- Reports menu
- Sales menu
- Administration menu

9

### Facilities

- ☒ Cannabis Connection | A11-0000002-LIC
- ☐ Cannabis Creations | CDPH-0000003
- ☐ Cannabis Farms | CML17-0000001

The Account Manager can use *Facilities* to grant each employee access to one or more facilities at once instead of entering that person into each individual facility's license number. The Account Manager can change access at any time.

10

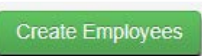
### Add Button



Select this button to add multiple employees at once.

11

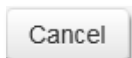
### Create Employees Button



Select this button to save the work and add the employee to the facility.

12

### Cancel Button



Only select this button to exit the page, without saving.

13

### Clear Button



Only select this button to clear all information that is currently entered into the page.

## 2.5.2 Edit Employee

The screenshot shows the 'Edit Employees' form for 'Employee # 1'. The form includes the following fields and controls:

- Employee** (1): A dropdown menu showing 'John Jones'.
- Username / Employee Lic. Number** (2): A text input field containing 'John Jones@CanCon.Com'.
- Enable Online Access Checkbox** (3): A checked checkbox labeled 'Enable online access to this Facility'.
- E-mail** (4): A text input field containing 'John Jones@CanCon.Com'.
- Resend Welcome E-mail** (5): An unchecked checkbox labeled 'Resend Welcome E-mail'.
- Home Page Drop-Down** (6): A dropdown menu showing 'Home'.
- Employment Checkbox** (7): A group of three checkboxes: 'Owner at this Facility' (unchecked), 'Manager at this Facility' (checked), and 'Employee' (unchecked).
- Permissions** (8): A section with multiple menus:
  - Packages Page**: Grids (req'd) [View], Inventory [Manage], Create/Submit/Disc. [Manage].
  - Transfers Menu**: Licensed & External [Manage], Templates [Manage], Hub [Manage].
  - Financials Menu**: All [Manage].
  - Reports Menu**: All [View].
  - Admin Menu**: Tag Orders [Manage], Tags [Manage], Strains [Manage], Items [Manage], Employees [Manage].
- Clear Button** (12): A button labeled '(clear)'.
- Plus Button** (9): A button with a '+' icon.
- Save Employees Button** (10): A green button labeled 'Save Employees'.
- Cancel Button** (11): A button labeled 'Cancel'.

Exhibit 6: The Edit Employee Page

1

### Employee

Employee John Jones

Select the employee name (<First Name> <Last Name>) to be edited from the drop-down list.

2

### Employee Lic. Number/Username

Employee Lic. Number John Jones@CanCon.Com

The *Employee License Number* field contains the *Username* of the employee. The *Username* is initially set based on the *E-mail* address entered on the *Add Employee* page, but going forward it can only be updated by the employee on their *User Profile*. This field is read-only.

3

**Enable Online Access checkbox**
☒ Enable online access to this Facility

Use this checkbox to grant the employee online access for the current facility. This checkbox will normally be checked for all employees.

4

**Email**

E-mail John Jones@CanCon.Com

This is the email address and *Username* of the employee. While the initial *Username / E-mail* value is set when the employee is added to Metrc, going forward it can only be updated by the employee on their *User Profile*. This field is read-only.

5

**Resend Welcome E-mail**
☐ Resend Welcome E-mail

This checkbox only displays when an employee has never set-up their *User Profile*. When checked and the *Save Employees* button is selected, the *Welcome to Metrc* email is resent to provide the employee with new first-time login information.

6

**Home**

Home - Select Home -

Select the *Home* page that should be displayed for the employee upon login based on job duties. This is where the employee will typically begin his/her work. It does not affect an employee's ability to navigate from page to page.

7

**Employment**
 Employment ☐ Owner at this Facility  
☐ Manager at this Facility  
☐ Employee

Identify the role at the facility (owner, manager, or employee). Permissions are not set by this option (see below).

8

**Permissions****Permissions**

The Account Manager grants permissions to each employee (including owners and managers) based on job duties. These permissions can be edited by the Account Manager as needed.

Select each checkbox to grant access to Metrc pages and menus. These vary according to facility type. For example, Retailers have sales permissions that Cultivators do not have. Examples include:

- Plants page
- Packages page
- Transfers page
- Transfers Hub page
- Reports menu
- Sales menu
- Administration menu

9

**Add Button**

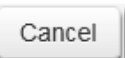
Select this button to add multiple employees at once.

10

**Save Employees Button**

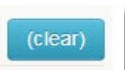
Select this button to save the work and add the employee to the facility.

11

**Cancel Button**

Only select this button to exit the page, without saving.

12

**Clear Button**

Only select this button to clear all information that is currently entered into the page.

## 2.6 Adding Strains and Items

Each facility will add strains and items which will be used to enter beginning inventory or transfer inventory. Strains should be entered first as some items will need to use the strain names created from this step. Items created for the facility will correspond to the products the facility produces.

### 2.6.1 Adding Strains

The screenshot shows the 'Add Strains' window with the following elements:

- Strain # 1**: The main header for the strain entry.
- Strain Name**: A text input field with a red border, labeled with a blue circle 1.
- Testing Status**: A dropdown menu with '- Select -' as the current selection, labeled with a blue circle 2.
- THC and CBD Content**: A section with input fields for THC and CBD, labeled with a blue circle 3.
- Indica vs. Sativa**: Two sliders for Indica and Sativa content, labeled with a blue circle 4.
- Add More Items**: A button with a plus sign, labeled with a blue circle 5.
- Create Strains**: A green button at the bottom, labeled with a blue circle 6.
- Cancel**: A grey button at the bottom, labeled with a blue circle 7.

Additional text in the window includes a note about reporting THC potency as a percentage of the overall weight and a list of checkboxes for various cannabis-related categories.

Exhibit 7: The Add Strains Page

1

#### Strain Name

Name AK47

Enter the strain name of all strains currently grown in each facility (required field).

2

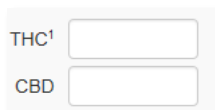
#### Testing Status

Testing Status - Select -

Select whether or not this strain has been tested, and if so was it done in-house or by a third party (optional field). This field does not have any effect on State testing requirements.

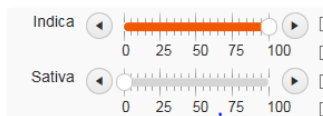


3

**THC and CBD Content**A form with two input fields. The first field is labeled 'THC¹' and the second field is labeled 'CBD'. Both fields are empty and have a light gray border.

Enter the THC and CBD content (optional field).

4

**Indica vs. Sativa**A slider control for Indica vs. Sativa. The top slider is labeled 'Indica' and has a range from 0 to 100 with major ticks at 0, 25, 50, 75, and 100. The bottom slider is labeled 'Sativa' and also has a range from 0 to 100 with major ticks at 0, 25, 50, 75, and 100. The sliders are currently set to 0 for Indica and 100 for Sativa.

Indicate the level of Sativa vs. Indica for each plant.

5

**Add More Items**

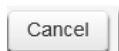
Select this button to add multiple strains from this page at one time.

6

**Create Strains Button**

Select this button to save entered data and create strains.

7

**Cancel Button**

Select this button to exit the page without saving any changes.

## 2.6.2 Adding Items

Items are used to track the licensee's inventory through the supply chain life cycle. The *Item Names* are used to identify what type of item is packed into a package. An inventory list of a licensee's current plants or packaged product is a good starting point to create the items in Metrc.

When adding items into Metrc using the page shown in Exhibit 8, keep in mind that:

1. When creating packages, the term *Items* identifies what type of item is in a Metrc package.
2. *Items* in Metrc allow each industry facility to have their own item names.
3. An item name cannot be just simply a category name. It must be specific to the item in that package or production batch.
4. Unlike Employees, Strains and Locations, Items cannot be created for multiple facilities at one time.
5. See Section 3.2 below for information on switching between facilities.
6. Each facility creates its own items that are unique with item name, category and strain. A facility cannot create duplicate item names.
7. Each item requires a category selection and these categories are determined by the State of California.
8. The purpose of the categories is for grouping similar items for reporting purposes.
9. The item name will identify what is in the package and the category the item belongs in.
10. The facility that packages an item will assign the item name to the package. The package will retain that item name unless it is re-packaged.
11. When creating a package, the item name will be chosen from the list of items previously created.

California has defined the item categories to be used by the industry.

### 2.6.2.1 Add Items

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

- Item # 1**: A label at the top left of the form area.
- (clear)**: A button at the top right of the form area.
- Name**: A text input field.
- Unit of Measure**: A dropdown menu with "- Select -" as the current selection.
- Category**: A dropdown menu with "- Select -" as the current selection.
- +**: A blue button with a plus sign, labeled "Add More Items" in the callout.
- Create Items**: A green button at the bottom center.
- Cancel**: A white button with a gray border at the bottom center.

Numbered callouts point to the following elements:

- 1: Add Item's Name (points to the Name input field)
- 2: Category (points to the Category dropdown menu)
- 3: Unit of Measure (points to the Unit of Measure dropdown menu)
- 4: Add More Items (points to the + button)
- 5: Create Items button (points to the green Create Items button)
- 6: Cancel button (points to the white Cancel button)

Exhibit 8: The Add Items Page

1

#### Add Item's Name

A close-up of the "Name" input field, showing the label "Name" to the left of the text box.

Enter the item's name to identify what type of item is packed into a package. Items must be uniquely named, even if they are in different categories. For items that are in a *Category* requiring a strain designation, create a unique item name for each strain (i.e., Bud's Blue Dream, etc.).

2

#### Category

A close-up of the "Category" dropdown menu, showing the label "Category" to the left of the dropdown box, which currently displays "- Select -".

Use the drop-down to select a *Category* for each item. *Categories* are defined by the State of California and are shown in Exhibit 9 with the associated tracking requirements. Use of some *Item Categories* may be limited to certain license types, as determined by the State.

<b>Category</b>	<b>Quantity Type</b>	<b>Strain Required</b>	<b>Unit Volume Required</b>	<b>Unit Weight Required</b>
Capsule	<i>Count Based</i>	NO	NO	YES
Clone - Cutting	<i>Count Based</i>	NO	NO	NO
Clone - Tissue Culture	<i>Count Based</i>	NO	NO	NO
Edible (volume - each)	<i>Count Based</i>	NO	YES	NO
Edible (volume)	<i>Volume Based</i>	NO	NO	NO
Edible (weight - each)	<i>Count Based</i>	NO	NO	YES
Edible (weight)	<i>Weight Based</i>	NO	NO	NO
Extract (volume - each)	<i>Count Based</i>	NO	YES	NO
Extract (volume)	<i>Volume Based</i>	NO	NO	NO
Extract (weight - each)	<i>Count Based</i>	NO	NO	YES
Extract (weight)	<i>Weight Based</i>	NO	NO	NO
Flower	<i>Weight Based</i>	YES	NO	NO
Flower (packaged eighth - each)	<i>Count Based</i>	YES	NO	YES
Flower (packaged gram - each)	<i>Count Based</i>	YES	NO	YES
Flower (packaged half ounce - each)	<i>Count Based</i>	YES	NO	YES
Flower (packaged ounce - each)	<i>Count Based</i>	YES	NO	YES
Flower (packaged quarter - each)	<i>Count Based</i>	YES	NO	YES
Fresh Cannabis Plant	<i>Weight Based</i>	YES	NO	NO
Immature Plant	<i>Count Based</i>	YES	NO	NO
Infused Butter/Oil (volume - each)	<i>Count Based</i>	NO	YES	NO
Infused Butter/Oil (volume)	<i>Volume Based</i>	NO	NO	NO
Infused Butter/Oil (weight - each)	<i>Count Based</i>	NO	NO	YES
Infused Butter/Oil (weight)	<i>Weight Based</i>	NO	NO	NO
Kief	<i>Weight Based</i>	YES	NO	NO
Leaf	<i>Weight Based</i>	YES	NO	NO
Shake	<i>Weight Based</i>	NO	NO	NO
Shake (Packaged Eighth - each)	<i>Count Based</i>	NO	NO	YES
Shake (Packaged Gram - each)	<i>Count Based</i>	NO	NO	YES
Shake (Packaged Half Ounce - each)	<i>Count Based</i>	NO	NO	YES
Shake (Packaged Ounce - each)	<i>Count Based</i>	NO	NO	YES
Shake (Packaged Quarter - each)	<i>Count Based</i>	NO	NO	YES
Other Concentrate (volume - each)	<i>Count Based</i>	NO	YES	NO
Other Concentrate (volume)	<i>Volume Based</i>	NO	NO	NO
Other Concentrate (weight - each)	<i>Count Based</i>	NO	NO	YES
Other Concentrate (weight)	<i>Weight Based</i>	NO	NO	NO
Pre-Roll Flower	<i>Count Based</i>	YES	NO	YES

Category	Quantity Type	Strain Required	Unit Volume Required	Unit Weight Required
Pre-Roll Infused	<i>Count Based</i>	NO	NO	YES
Pre-Roll Leaf	<i>Count Based</i>	YES	NO	YES
Seeds (each)	<i>Count Based</i>	YES	NO	NO
Seeds	<i>Weight Based</i>	YES	NO	NO
Tincture (volume - each)	<i>Count Based</i>	NO	YES	NO
Tincture (volume)	<i>Volume Based</i>	NO	NO	NO
Tincture (weight - each)	<i>Count Based</i>	NO	NO	YES
Tincture (weight)	<i>Weight Based</i>	NO	NO	NO
Topical (volume - each)	<i>Count Based</i>	NO	YES	NO
Topical (volume)	<i>Volume Based</i>	NO	NO	NO
Topical (weight - each)	<i>Count Based</i>	NO	NO	YES
Topical (weight)	<i>Weight Based</i>	NO	NO	NO
Vape Cartridge (volume - each)	<i>Count Based</i>	NO	YES	NO
Vape Cartridge (weight - each)	<i>Count Based</i>	NO	NO	YES
Waste	<i>Weight Based</i>	NO	NO	NO

Exhibit 9: State of California Item Categories

3

## Unit of Measure

Unit of Measure

- Select -

▼

Use the drop-down to select the unit of measure. Depending on the *Quantity Type* defined for the *Category* selected, the available drop-down values may vary, as shown in Exhibit 10. Depending on the *Category* selected, *Unit Weight* or *Unit Volume* may also be required. See *Dynamic Fields* below.

Weight	Volume	Count
Grams	Fluid Ounces	Each
Kilograms	Gallons	
Milligrams	Liters	
Ounces	Milliliters	
Pounds	Pints	
	Quarts	

Exhibit 10: Units of Measure

4

**Add More Items**

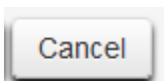
Select this button to add multiple items from this page at one time.

5

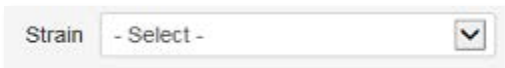
**Create Items Button**

Select this button to create items, save the work and exit.

6

**Cancel Button**

Select this button to exit the page without saving any changes.

**Dynamic Fields (shown based on prior data entry):****Strain**

This field displays when the *Category* requires a strain designation.

**Unit Weight**

Use this drop-down to enter a unit weight (based on *Category*).

**Unit Volume**

Use this drop-down to enter a unit volume (based on *Category*).

## 3 Metrc Basics


### 3.1 Navigating in Metrc

Navigating in Metrc is similar to navigating in a traditional website. Metrc uses toolbars and drop-down menus for navigation that can be accessed using a mouse to navigate and perform functional tasks. As shown in Exhibit 11, the primary Metrc navigation bar runs along the top of the window.



Exhibit 11: Metrc's Primary Navigation Bar

The navigation bar has menus for each functional area of the application. A particular menu displays only if the user has the permission to access at least one of the options on that menu.

When the  down arrow to the right of a menu is selected, a drop-down menu of options is displayed as demonstrated in Exhibit 12 for the *Transfers* menu. The options that display are based on user permissions.

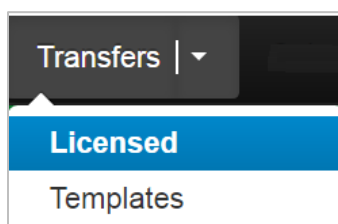




Exhibit 12: Transfers Menu Options (Based on User Permissions)

For menus without the  down arrow and those delineated with a , clicking directly on the menu name navigates the user to the default page for that functional area. The default pages are outlined in Exhibit 13 below.

Menu	Default Page
<i>Plants</i>	<i>Plants</i>
<i>Packages</i>	<i>Packages</i>
<i>Transfers</i>	<i>First available option in menu drop-down list</i>
<i>Sales</i>	<i>Sales Receipts</i>
<i>Reports</i>	<i>Reports Control Panel</i>
<i>User</i>	<i>User Profile</i>

Exhibit 13: Default Pages for Navigation Bar Menus

### 3.1.1 Licenses and Permissions

The options available in the top navigation bar are based on employee permissions and the facility type (as shown in Exhibit 14). Not all facility types are represented in this table.

	Cultivator 1	Cultivator Processor Only 2	Distributor 3	Distributor Transport Only 4	Manufacturer 5	Manufacturer Packaging/Labeling Only 6	Retailer 7	Testing Laboratory 8	Microbusiness 9
	Cultivator	Cultivator Processor Only	Distributor	Distributor Transport Only	Manufacturer	Manufacturer Packaging/Labeling Only	Retailer	Testing Laboratory	Microbusiness
Plants	✓								✓
Packages	✓	✓	✓		✓	✓	✓	✓	✓
Packages - Remediation					✓	✓			✓
Packages - Test Product								✓	
Transfers	✓	✓	✓		✓	✓	✓	✓	✓
Transfers Hub			✓	✓				✓	✓
Sales							✓		✓
Admin	✓	✓	✓	✓	✓	✓	✓	✓	✓
Reports	✓	✓	✓	✓	✓	✓	✓	✓	✓

Exhibit 14: Navigation Bar Options Based on Facility Type

1

#### Cultivator

Cultivators have permissions for *Plants*, *Packages*, *Transfers*, *Admin*, and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function permitting abbreviation of the business name in the licensing system to make the name shorter and friendlier. Employees can have any or all of the designated permissions at the discretion of the Account Manager.

2

#### Cultivator-Processor Only

Cultivators - Processor Only have permissions for *Packages*, *Transfers*, *Admin*, and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.



3

**Distributor**

Distributors have permissions for *Packages*, *Transfers*, *Transfers Hub*, *Admin*, and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

4

**Distributor – Transport Only**

Distributors – Transport Only has permissions for *Transfers Hub*, *Admin*, and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

5

**Manufacturer**

Manufacturers have permissions for *Packages*, *Packages – Remediation*, *Transfers*, *Admin*, and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

6

**Manufacturer - Packaging/Labeling Only**

Manufacturers - Packaging/Labeling Only have permissions for *Packages*, *Packages – Remediation*, *Transfers*, *Admin*, and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

7

**Retailer**

Retailers have permissions for *Packages*, *Transfers*, *Sales*, *Admin*, and *Reports*. The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

8

**Testing Laboratory**

Testing Laboratories have permissions for *Packages*, *Packages – Test Product*, *Transfers*, *Transfers Hub*, *Admin*, and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

9

**Microbusiness**

Microbusinesses have permissions for *Plants*, *Packages*, *Packages – Remediation*, *Transfers*, *Transfers Hub*, *Sales*, *Admin*, and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

## 3.2 Switching Facilities

If you are an Account Manager or an employee for multiple licenses, you will have more than one license to choose from. In the upper right-hand corner, use the drop-down arrow to select a facility from a list of facilities, as shown in Exhibit 15.

- For employees of a single facility, only that facility is shown.
- For employees of multiple facilities, first select a facility from the list.



1

### Current Facility

Cannabis Controls LLC | C11-8212018-LIC

Displays the current facility that the user is working in.

2

### Drill-down Arrow



Use this arrow to switch to another facility the user has access to.

3

### Other Available Facilities

Cannabis Controls LLC	C11-8212018-LIC
Cannabis Creations	CDPH-00000003
Cannabis Farms	CCL17-00000001
Lily's Green Labs	C8-0000016-LIC

Lists the other facilities the user has access to in order to switch from one to another.

### 3.3 Common Elements

Commonly used elements in Metrc are illustrated in Exhibit 16 and described below.

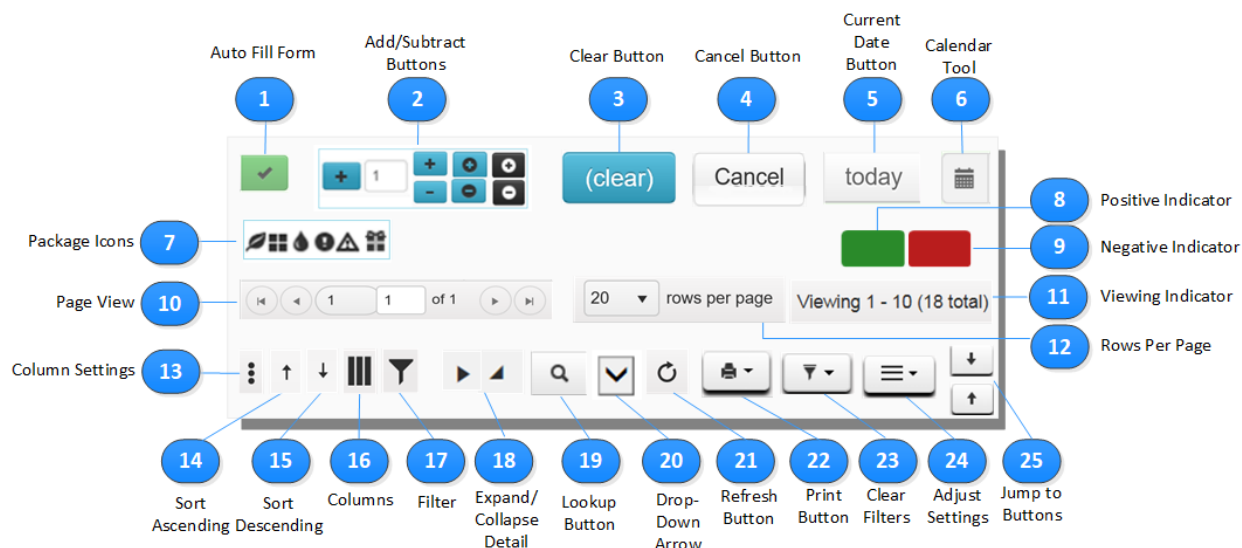


Exhibit 16: Common Metrc Elements

1

#### Auto Fill Form







This button is used on form templates to populate a specified value in the same field on multiple entry forms.



2

#### Add/Subtract Buttons



Use the  field to enter the number of items to create at one time and then select the  button.

The standalone  and  buttons are used to add/remove additional entry forms when adding/updating information in Metrc.

The  and  buttons and the  and  buttons are used to add/remove additional content to an entry form.

3

**Clear button**

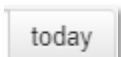
This button is used to clear all information that is currently entered into the fields on the page, prior to completing the transaction.

4

**Cancel Button**

This button cancels the operation prior to saving information in a field.

5

**Current Date Button**

Press this button to populate the field with the current date.

6

**Calendar Tool**

This button launches the Calendar Tool to allow the user to select a date to populate in the field.

7

**Package Icons**

These icons provide an at-a-glance view of the contents of a package or packages in a transfer.



Plant Package



Product Package (e.g. flower or brownies)



Lab Sample Package



Remediated Product Package



Product Requires Remediation - this feature is not used in California



Donation Package

8

**Positive Indicator**

Text highlighted in green emphasizes a positive situation. For example, a package that has been transferred successfully displays a Status of **Accepted**, indicating the situation is positive and likely requires no further action.

9

**Negative Indicator**

Text highlighted in red emphasizes a negative situation. For example, a package that has been placed on hold displays a **Yes** in the Administrative Hold column, bringing attention to a negative situation that potentially requires attention.

10

**Page View**

This function shows the number of pages this area has available. It is used in conjunction with the *Rows per Page*.

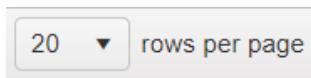
11

**Viewing Indicator**

Viewing 1 - 10 (18 total)

This indicator shows the number of items being viewed with the total number of items meeting the filter criteria indicated in parentheses.

12

**Rows per Page**

This bar shows the number of rows that can be viewed per page: 5, 10, 20, 50, or 100. The number of rows per page defaults to 20, but this value can be changed by using the drop-down arrow to select a different setting.

13

**Column Settings**

Pressing this button displays the *Column Settings* menu to change the sort of the data, the columns viewed on the grid, or filter the data displayed.

14

**Sort Ascending**

This arrow indicates that the data is displayed in ascending order (A to Z) by the data contained in the column.

15

**Sort Descending**

This arrow indicates that the data is displayed in descending order (Z to A) by the data contained in the column.

16

**Columns**

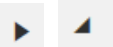
Selecting this option from the *Column Settings* menu allows for the customization of the columns displayed by checking and unchecking the available columns.

17

**Filter**

Selecting this option from the *Column Settings* menu accesses the filter feature. See Section 3.5 for more details on search functions.

18

**Expand/Collapse Detail Arrow**

Press the  expand button to display additional detail related to a row.

Press the  collapse button to hide the additional detail related to a row.

19

**Lookup Button**

Press this button to display a *Select List* of items to choose from to populate the field. Generally used when there are a large number of items to choose from.

Hover over this button to display details of a selected item or an item in a grid, such as a package or harvest.

20

**Drop-Down Arrow**

Select the drop-down arrow to display a list of items to choose from to populate the field. Generally used when there are a small number of items to choose from.

21

**Refresh Button**

Press this button to refresh the data on a page.

22

**Print Button**

Press this button to print the filtered information.

23

**Clear Filters**

Place the mouse over the *Clear Filters* button to display all currently applied filters.

Press this button to clear all filters set on a grid using the *Filter Feature* described in Section 3.5.3 below.



24

**Adjust Settings**

Press this button to reset the grid settings to the default state when the column display has been modified (see Section 3.5.2 below).

25

**Jump to Bottom/Jump to Top Buttons**

Pressing the down arrow button at the top of the grid jumps to the bottom of the grid. Pressing the up arrow button at the bottom of the grid jumps to the top of the grid.

### 3.4 Notifications

The Metrc application utilizes two methods of automated communication to relay important information to licensees.

The first method is to display a banner across the top of the page upon logging into the Metrc and selecting a specific license from the facility drop-down. Exhibit 17 shows an example of a banner that displays when a package is placed on administrative hold by the State of California.

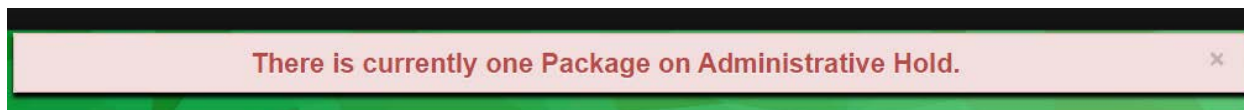


Exhibit 17: Notification Banner

The second method is to display an envelope icon in the top navigation panel. As shown in Exhibit 18, the envelope contains notifications such as transfer rejections and transfer package adjustments which may require action on the part of the licensee.

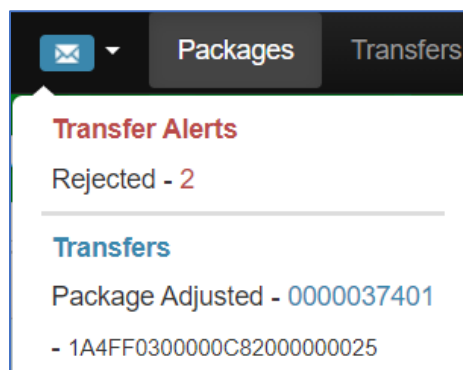


Exhibit 18: Notification Envelope

## 3.5 Using Search Functions

Search functions allow the industry user to search their inventory based on various criteria. Metrc provides the ability to search in multiple ways with many variables and minimal data. The following instructions demonstrate several examples of how to use the search features.

### 3.5.1 Sorting

The sort of the data can be changed by clicking a column heading. The up arrow indicates an ascending sort (A to Z).



Exhibit 19: Ascending Sort

Clicking the column again changes the sort to descending. The down arrow indicates a descending sort (Z to A).

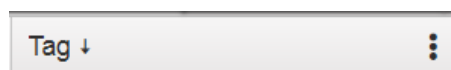



Exhibit 20: Descending Sort

By selecting the *Column Settings* button  the sort order of the data can also be modified to ascending or descending by selecting the required sort from the menu.

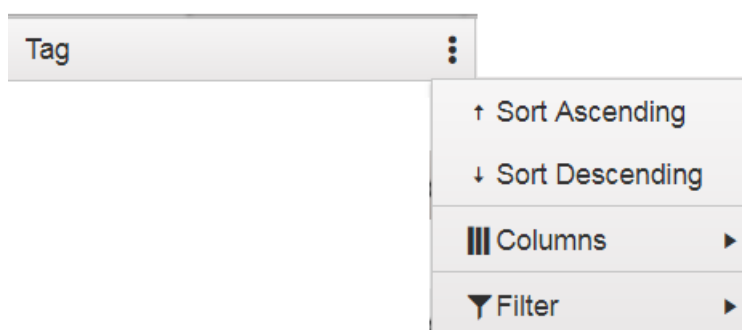


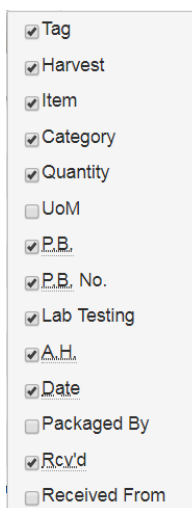


Exhibit 21: The Column Settings Menu

### 3.5.2 Column Display

Selecting the *Columns*  **Columns**  option from the *Column Settings* menu allows for the customization of the columns displayed by checking and unchecking the available columns.





**Exhibit 22: The Column Display List**

Changes to the *Column Settings* persist between page reloads and from one browsing session to another, however, they do not persist across different browsers.

The default display can be restored by selecting the *Reset Settings* option from the *Adjust Settings* drop-down displayed above the data table as described previously in Section 3.3 above.

### 3.5.3 Filter Feature

Selecting the *Filter*  **Filter**  option from the *Column Settings* menu accesses the filter feature. The filter feature allows for searching within each of the individual columns by the criteria specified.

The filter feature shown in Exhibit 23 below allows searching within each of the individual columns. Once information has been entered into the fields, select the *Filter* button to start the query. See the *Metrc Manual/User Guide* for more information.

### 3.5.3.1 Searching for Items

Exhibit 23: Searching for Items

The filter feature shown in Exhibit 23 allows searching within each of the individual columns. Once information has been entered into the fields, select the *Filter* button to start the query. See the *Metrc Manual/User Guide* for more information.

1

#### First Search Parameter

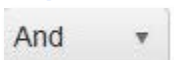
Use this filter box to filter searches for all items except quantities columns. Search parameters include:  
*Contains, Does not Contain, Starts with, Ends with, Equal to, and Not Equal to.*

2

#### First Search Value

Use this field to enter search information (such as the last few digits of a package tag).

3

**Multiple Filter Addition**

Use this filter box to allow an additional filter to be added to the first. Search parameters include:  
*And* or *Or*.

4

**Second Search Parameter**

Use this filter box to filter searches by two selections for all items except quantities columns. Search parameters include:  
*Contains*, *Does not Contain*, *Starts with*, *Ends with*, *Equal to*, and *Not Equal to*.

5

**Second Search Value**

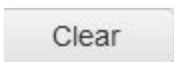
Use this field to enter search information (such as the last few digits of a package tag).

6

**Filter Button**

Select this button to search or filter for matching records.

7

**Clear Button**

Select this button to clear all previous filter information.

### 3.5.3.2 Searching for Quantities

Filter by:

1 Equal to

2

3 And

4 Equal to

5

6 Filter

7 Clear Button

Exhibit 24: Searching for Quantities

1

#### First Search Parameter

Equal to

Use this filter box to filter quantities columns. Search parameters include: *Equal to*, *Not Equal to*, *Greater than or Equal to*, *Greater than*, *Less than or Equal to*, *Less than*.

2

#### First Search Value

Use this field to enter search information (such as the quantity in a package).

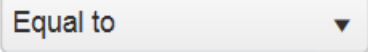
3

#### Multiple Filter Addition

And

Use this filter box to add an additional filter to the first. Search parameters include: *And* or *Or*.

4

**Second Search Parameter**

Use this filter box to filter searches by two selections for all items except quantities columns. Search parameters include:  
*Equal to, Not Equal to, Greater than or Equal to, Greater than, Less than or Equal to, Less than.*

5

**Second Search Value**

Use this field to enter search information (such as the quantity in a package).

6

**Filter Button**

Select this button to search or filter for matching records.

7

**Clear Button**

Select this button to clear all previous filter information.



### 3.5.3.3 Search Examples

#### **One Search Parameter**

Search options allow searching by:

*Is equal to, is not equal to, starts with, contains, does not contain, and ends with.*

- Package Tag – Search using *is equal to* if you know the exact package tag.
- Package Tag – Search using *starts with* if you know the first 3 digits of the package tag number.
- Package Tag – Search using *ends with* or *contains* if you know the last 3 digits of the package tag number.

#### **Multiple Search Parameters (And / Or Searches)**

Multiple search options allow *and/or* searches using single or multiple values.

- Package Tag – If you know the first 3 digits of a package tag number and the last 2 digits of that package tag, enter the first 3 digits of a package tag number into the first parameter and the last 2 digits into the second parameter using *and*.
- To see all the transfers in a particular month, enter the month in the first parameter and the year in the Multiple Filter Addition using *and*.

#### **Multiple Search Parameters (Other than And / Or Searches)**

You can search by two (2) parameters. Search options allow searching by:


*Is equal to, is not equal to, starts with, contains, does not contain, and ends with.*

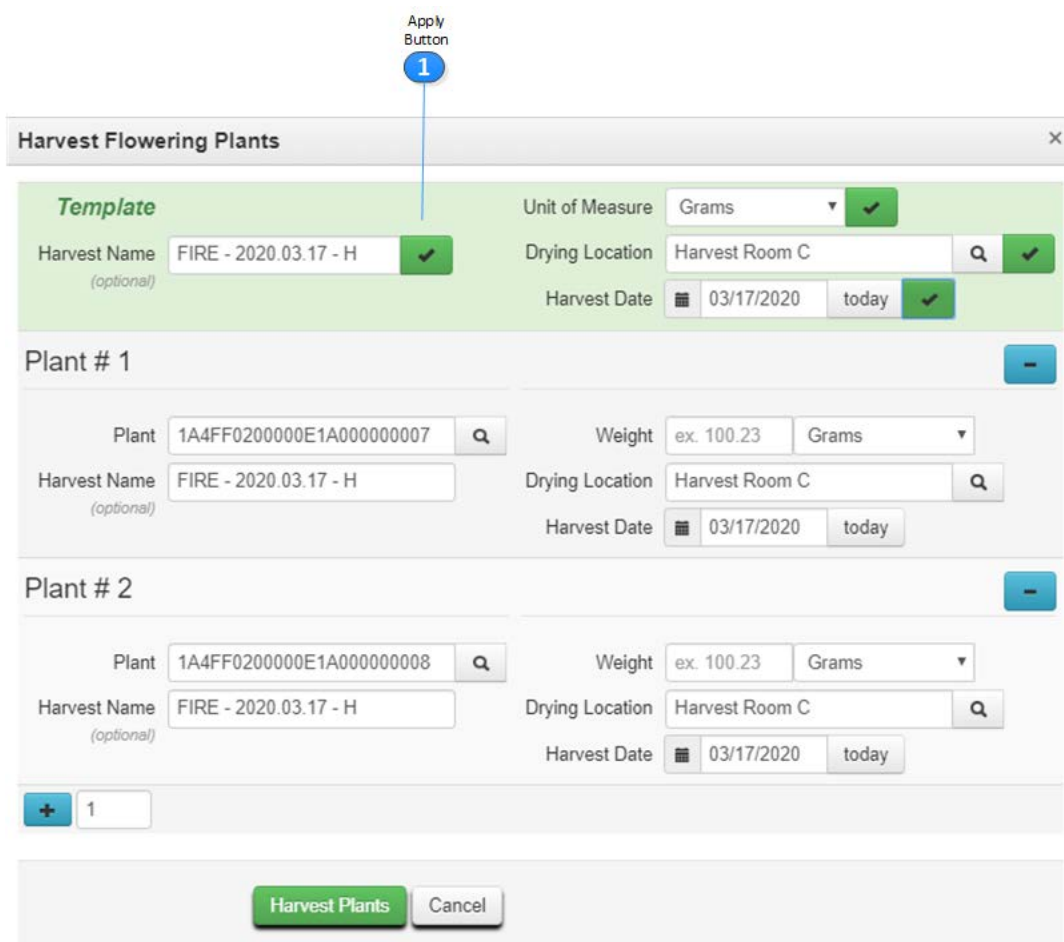
- Package Tag – Search using *starts with*, and *is equal to* if you know the first three (3) digits and the last three (3) digits of the package tag.
- Transfer Date – Search using *is equal to* if you know the date the transfers were initiated.

## 3.6 Templates

Metrc includes template functionality that is enabled when the user indicates that more than one item is to be used or created in a single action. Templates allow the user to record information more efficiently when taking action on multiple items simultaneously. Examples of templates available when *Harvesting Flowering Plants* and creating *New Packages* are outlined below.

### 3.6.1 Harvesting Multiple Plants Template

The example shown in Exhibit 25 demonstrates that when *Plant #2* is added to the *Harvest Flowering Plants* form, the *Template* is activated. The values entered in the *Template* are propagated to both *Plant #1* and *Plant #2* when the *Apply* button  is selected for a particular field. The *Plant* and *Weight* are not included in the *Template* and must be entered individually into the form for *Plant #1* and *Plant #2*. Although the *Harvest Name* entered in the *Template* was applied to both plants, different *Harvest Names* could have been entered individually for each plant as well.



The screenshot displays the 'Harvest Flowering Plants' form. At the top, a blue circle with the number '1' points to the 'Apply' button (green checkmark) in the 'Harvest Name' field of the 'Template' section. The 'Template' section is highlighted in green and contains the following fields:

- Harvest Name (optional):** FIRE - 2020.03.17 - H (with a green checkmark)
- Unit of Measure:** Grams (with a green checkmark)
- Drying Location:** Harvest Room C (with a green checkmark)
- Harvest Date:** 03/17/2020 (with a green checkmark)


Below the template, there are two plant entries, 'Plant # 1' and 'Plant # 2', each with a minus button on the right. Each plant entry has the following fields:

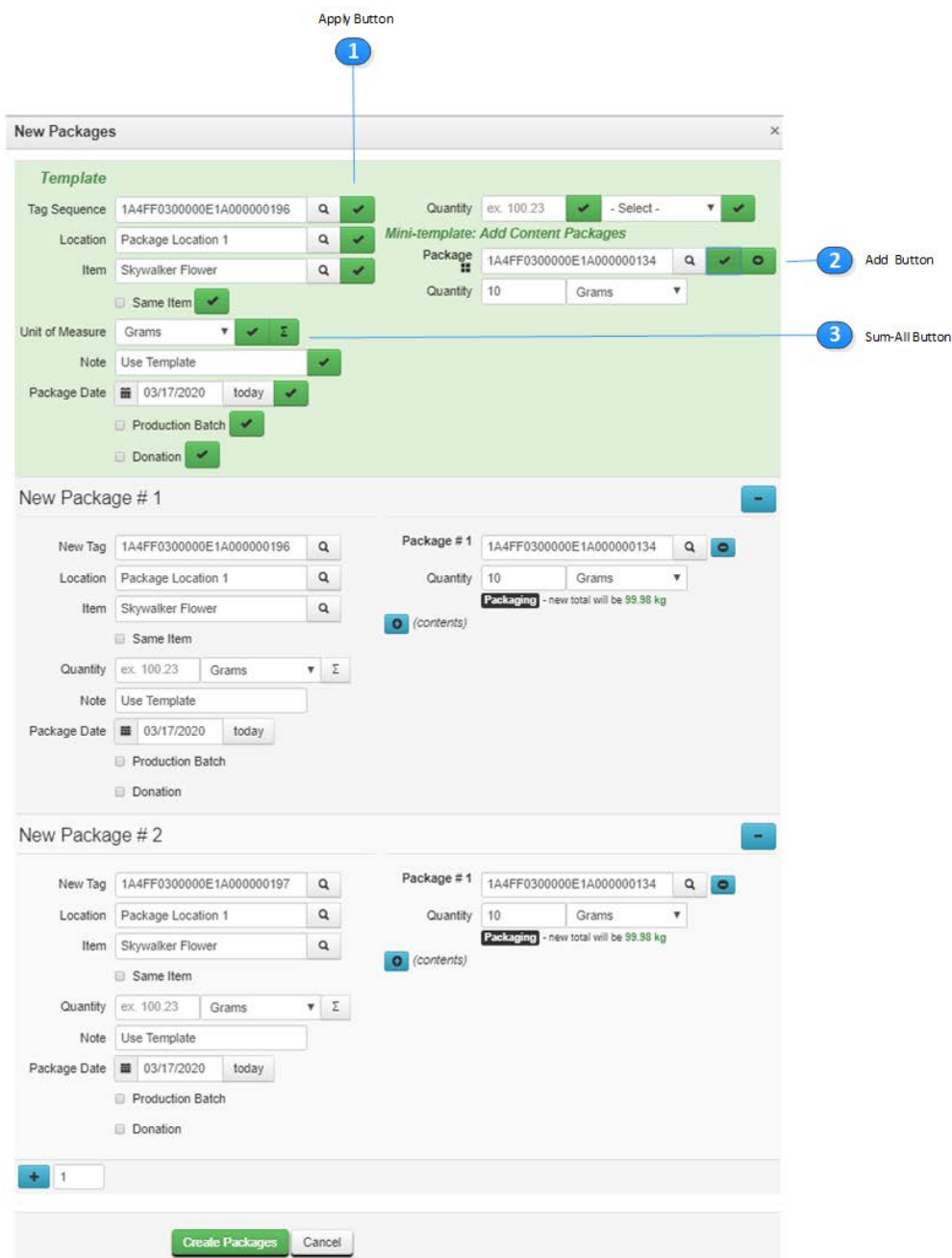
- Plant:** 1A4FF0200000E1A000000007 (for Plant #1) and 1A4FF0200000E1A000000008 (for Plant #2), each with a search icon.
- Weight:** ex. 100.23 (with a dropdown menu set to Grams)
- Harvest Name (optional):** FIRE - 2020.03.17 - H (for both plants)
- Drying Location:** Harvest Room C (with a search icon)
- Harvest Date:** 03/17/2020 (with a 'today' button)

At the bottom of the form, there is a plus button and a '1' in a box, indicating the number of items. At the very bottom, there are two buttons: 'Harvest Plants' and 'Cancel'.

Exhibit 25: Harvesting Multiple Plants Template

### 3.6.2 Creating Multiple Packages Template



The example shown in Exhibit 26 demonstrates that when *New Package #2* is added to the *New Packages* form, the *Template* is activated. The values entered in the *Template* are propagated to both *New Package #1* and *New Package #2* when the *Apply* button  is selected for a particular field. The *Quantity* of the new packages is not included in the *Template* and must be entered individually into the form for *New Package #1* and *New Package #2*.



The screenshot displays the 'New Packages' form interface. At the top, a 'Template' section is highlighted in green. It contains fields for Tag Sequence, Location, Item, Unit of Measure, Note, Package Date, and checkboxes for Production Batch and Donation. A 'Quantity' field is also present. A callout '1' points to the 'Apply' button (a green checkmark icon) next to the Tag Sequence field. Below the template, there are two package entries: 'New Package #1' and 'New Package #2'. Each entry has its own set of fields, including Tag, Location, Item, Quantity, Note, and Package Date. A callout '2' points to the 'Add' button (a blue plus icon) next to the Tag field in 'New Package #1'. A callout '3' points to the 'Sum-All' button (a blue sigma icon) next to the Quantity field in 'New Package #1'. At the bottom of the form, there are 'Create Packages' and 'Cancel' buttons.

Exhibit 26: Creating Multiple Packages Template

This *Template* includes several advanced features:

- The *Tag Sequence* field can be used to select the *Package Tag UID* to assign to *New Package #1* and to assign the next available Tag(s) to the remaining *New Packages*.
- The *Mini-template* can be used to indicate a content *Package Tag UID(s)* used to create multiple packages. If the same quantity was used from the source package to create each of the new packages, the *Quantity* field in the *Mini-template* can be used in conjunction with the *Package* field. Once the *Package* and, optionally, the *Quantity* are selected, clicking the *Add* button  next to the *Package* field will add the *Package* and *Quantity* as a source package for each new package. This process can be repeated for multiple source packages if applicable.
- When at least one content package is added to one of the new packages, the *Quantity* field dynamically displays above the *Mini-template*. The *Quantity* field can be used to apply the same *Quantity* to each source package(s) being used to create the multiple packages.
- The *Sum All* button  can be used to populate the *Quantity* in each of the new packages based on the sum of the *Quantity* taken from each source package.

## 4 Tags

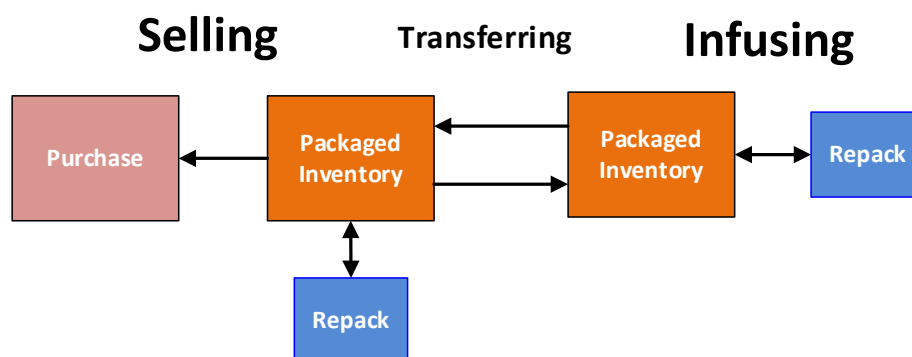
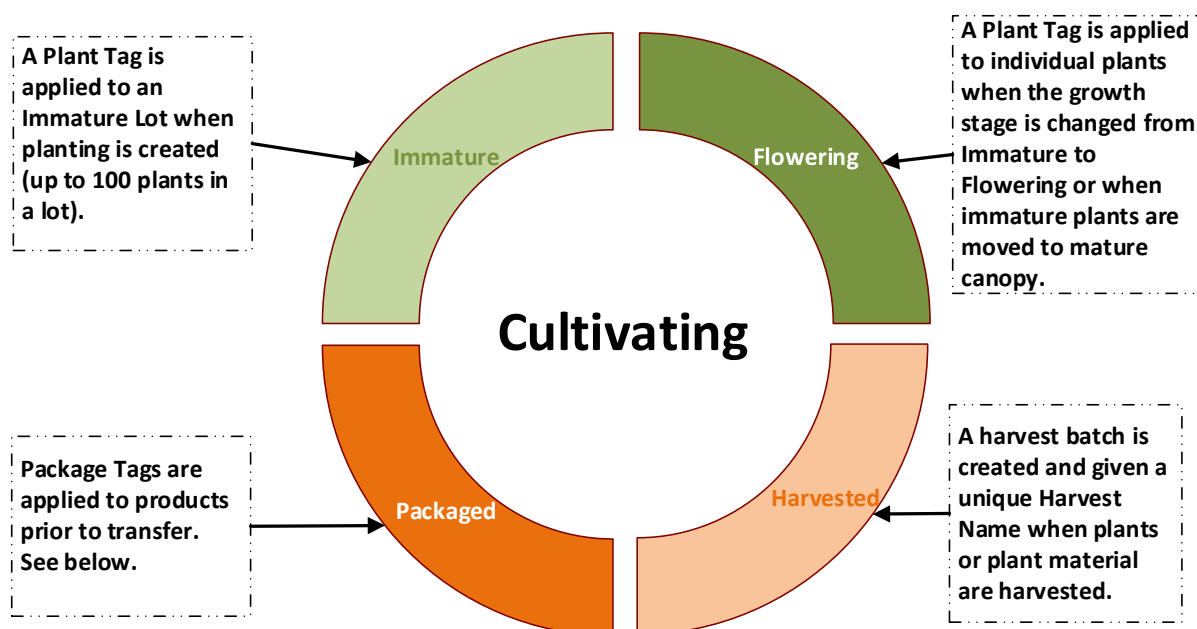


Exhibit 27: Metrc Life Cycle - Cultivation to Sale

Exhibit 27 shows the Metrc life cycle from cultivation to sale. The Metrc software system is based on this process.

## 4.1 Tag Orders

There are two different types of tags, plant tags and package tags. Tags are used to track plants and packages through the cultivation to sale life cycle. The license type determines which tags can be ordered. Only Cultivators and Microbusinesses can order plant tags.

Additional notes about tag ordering:

- Tags are ordered from the Metrc *Admin* function.
- There is no direct charge to the licensee for the tag order.
- The number of tags ordered cannot exceed the limits imposed by the State.
- Only physical addresses can be used to ship tag orders (P.O. boxes cannot be used).
- Tags will be sent by United Parcel Service (UPS) ground shipping.

### 4.1.1 New Tag Order

The Account Manager, or any user with sufficient permission, can access the *New Tag Order* page by selecting the *Tag Orders* option from the *Admin* menu in the top navigation bar.

The screenshot shows the 'New Tag Order' form with the following sections and callouts:

- Order Details**
  - Facility License Name/Number (1) points to the Facility License field.
  - Physical Address (2) points to the Physical Address field.
  - Cannabis Plant (3) points to the Cannabis Plant Count field.
  - Cannabis Package (4) points to the Cannabis Package Count field.
- Shipping Details**
  - Contact Name (5) points to the Contact Name field.
  - Phone Number (6) points to the Phone No. field.
  - Facility Button (7) points to the Copy from Facility dropdown.
  - Shipping Address (8) points to the Ship Address field.
- Notes Area** (9) points to the Please note section.
- Buttons**
  - Place Order Button (10) points to the Place Order button.
  - Cancel Button (11) points to the Cancel button.

**Order Details**

Facility License: Cannabis Cultivation, Inc. CCL18-0906009

Physical Address: 901 S. Coast Drive, Costa Mesa, CA 92626

Cannabis Plant: Count (3,982 max.)

Cannabis Package: Count (989 max.)

**Shipping Details**

Contact Name: John Jones

Phone No.: 714-273-8700

Copy from: Facility

Ship Address: 901 S. Coast Drive

Address Cont.:

City: Costa Mesa

State + Zip: CA 92626

\* Tags cannot be shipped to P.O. Boxes

**Please note:**

You MUST place separate Tag Orders for each Facility. Plant and Package Tags are programmed for each of your Facilities individually and are placed within your Metrc account automatically once received.

Make sure that you are in the correct Facility within Metrc when you place the order.

Tag Orders are *not* transferrable between Facilities.

All Tag Orders are final, so we recommend that you place your orders carefully.

**Place Order** **Cancel**

Exhibit 28: New Tag Order

Ordering plant and package tags using *New Tag Order* shown in Exhibit 28 is a simple process; however, it is very important to pay close attention when placing an order.

**NOTE: Metrc tags are custom printed for each facility and cannot be cancelled once they have been ordered. Be sure orders are placed for the correct facility, amount, and type of tags required.**

1

**Facility License Name and Number**

Facility License Cannabis Cultivation, Inc.  
CCL18-0906009

This field is auto-populated showing the facility that is currently ordering tags.

2

**Physical Address**

Physical Address 901 S. Coast Drive  
Costa Mesa, CA 92626

This field is auto-populated with the facility address on file with the State of California.

3

**Cannabis Plant Tag Amount/Maximum**

Cannabis Plant Count  × (3,982 max.)

Enter the number of plant tags being ordered. The maximum amount that can be ordered, based on license type and current tag inventory, is also shown. Only Cultivators and Microbusinesses can order plant tags.

4

**Cannabis Package Tag Amount/Maximum**

Cannabis Package Count  × (989 max.)

Enter the number of package tags being ordered. The maximum amount that can be ordered, based on license type and current tag inventory, is also shown.

5

**Contact Name**

Contact Name  John Jones

This field is auto-populated with the name of the Metrc user who is ordering the tags.



6

**Phone Number**

Phone No.	714-273-8700
-----------	--------------

This field is auto-populated with the phone number of the facility on file with the State of California.

7

**Facility Button**

Copy from	Facility ▼
-----------	------------

Select this button to auto-populate the shipping address from the physical facility address on file with the State of California.

8

**Shipping Address**

Ship Address *	901 S. Coast Drive
Address Cont.	
City	Costa Mesa
State + Zip	CA ▼
	92626
* Tags cannot be shipped to P.O. Boxes	

Use these fields to enter a different address from the physical address noted in the *Order Details* (this field is auto-populated when the *Facility* button above is selected).

9

**Notes Area****Please note:**

You MUST place separate Tag Orders for each Facility. Plant and Package Tags are programmed for each of your Facilities individually and are placed within your Metrc account automatically once received.

Make sure that you are in the correct Facility within Metrc when you place the order.

**Tag Orders are *not* transferrable between Facilities.**

**All Tag Orders are final, so we recommend that you place your orders carefully.**

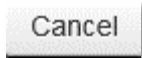
This field provides important information regarding tag orders for all facilities.

10

**Place Order Button**

Select this button to place the tag order for a specific facility.

11

**Cancel Button**

Select this button to exit the page without saving any data.

## 4.2 Receiving Tags into Metrc

A facility will not automatically receive the tag IDs into its system immediately after placing an order. Once the ordered tags are physically shipped, the tag ID numbers will then become available in Metrc. When the tag's ID numbers are available, a user can see the *Receive* button visible in the tag order page. This is a security feature to prevent the tags from becoming diverted or used by anyone other than the licensee who ordered the tags. When the tags are received, select the *Receive* button to receive them. The *Receive* function will populate ID numbers into that facility's Metrc account.

**NOTE: Do not receive the tags in Metrc until they are physically received.**

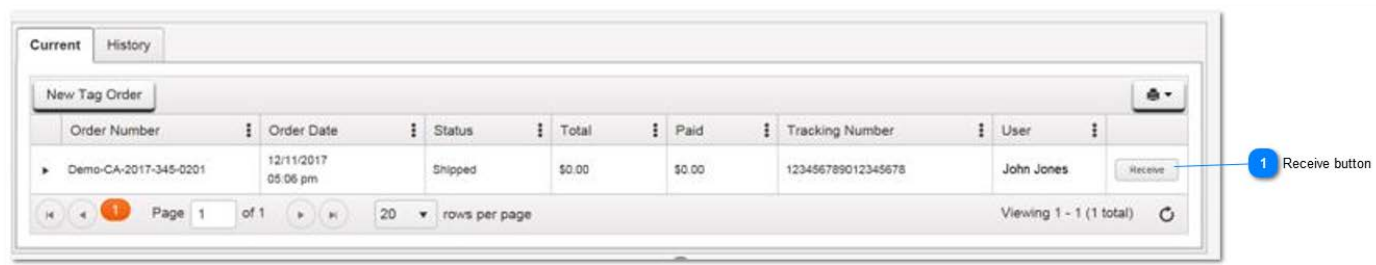


Exhibit 29: The Receive Button on the Tag Order Page

1

### Receive Button



Select this button to populate tag ID numbers into the Metrc account for that facility. Once the tags have been shipped, the *Receive* button will be visible on the right side of the page that corresponds to the order number. Selecting the *Receive* displays a confirmation prompt, as shown in Exhibit 30.

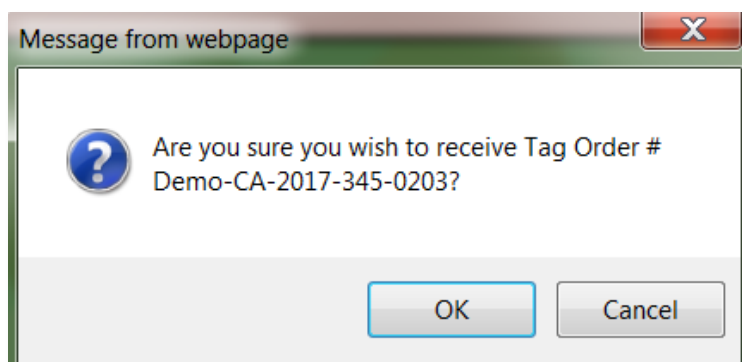


Exhibit 30: Receive Tag Order Confirmation Message

## 4.3 Monitor Tag Inventory

The Account Manager, or any user with sufficient permission, can monitor the tag inventory on the *Tags* page accessed from the *Admin* menu in the top navigation bar.

Tags in the facility inventory are categorized as *Available*, *Used* and *Voided*.

### 4.3.1 Available Tags

*Available Tags* such as those shown in Exhibit 31 are those that are assigned to the facility but have not yet been associated to an immature plant lot, flowering plant or package.

Tag	Type	Status	Commissioned	Void Button
1A8FF00000000220000000055	Plant	Received	12/12/2017 03:52 am	Void
1A8FF00000000220000000155	Plant	Received	12/12/2017 03:52 am	Void
1A8FF01000000022000000055	Package	Received	12/12/2017 03:52 am	Void
1A8FF01000000022000000155	Package	Received	12/12/2017 03:52 am	Void

Exhibit 31: The Available Tags Page

1

Tag

Tag

The unique identification number (UID) printed on the physical tag.

2

Type

Type

This is an indicator of the type of product to be tagged. The tag *Types* are *Plant* and *Package*.

3

**Status**A dropdown menu with the word "Status" on the left and three vertical dots on the right.

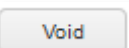
The status for tags on the *Available* tab should be listed as either *Commissioned* or *Received*. *Commissioned* means the tags have been generated and associated to the facility by Metrc but have not been *Received* by the facility.

4

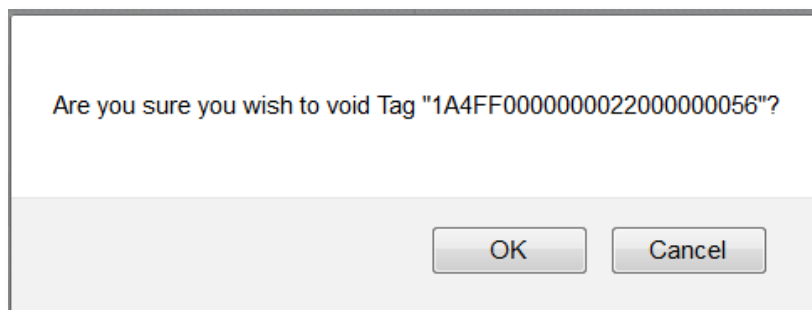
**Commissioned**A dropdown menu with the word "Commissioned" on the left and three vertical dots on the right.

Contains the date/time the tags were generated and associated to the facility by Metrc.

5

**Void Button**A rectangular button with the word "Void" in the center.

Select this button to record lost or damaged tags that have never been associated to a plant or package. When this button is selected, a prompt such as the one shown in Exhibit 32 displays for the user to confirm the action.



**Exhibit 32: Tag Void Confirmation Message**

### 4.3.2 Used Tags

*Used Tags* are those that are assigned to the facility and have been associated with an immature plant lot, flowering plant or package, as shown in Exhibit 33.

Tag	Type	Status	Commissioned	Used	Detached
14AF03000000220000000013	Plant	Used	12/12/2017 03:52 am	12/12/2017 12:21 pm	
14AF03100000220000000013	Package	Used	12/12/2017 03:52 am	12/12/2017 04:05 pm	

Exhibit 33: The Used Tags Page

1

Tag

Tag

The unique identification number (UID) printed on the physical tag.

2

Type

Type

This is an indicator of the type of product to be tagged. The tag *Types* are *Plant* and *Package*.

3

Status

Status

The status of the tags on the *Used* tab.

4

Commissioned

Commissioned

This field contains the date/time the tags were generated and associated with the facility by Metrc.

5

**Used**

Used

This field contains the date/time the tags were associated to an immature plant lot, flowering plant or package.

6

**Detached**

Detached

This field contains the date/time a tag was replaced by another tag.

### 4.3.3 Voided Tags

*Voided Tags* are those that are assigned to the facility, but have never been associated to an immature plant lot, flowering plant, or package, and have been voided by the Account Manager, or employee with tag permissions, due to loss or damage, as shown in Exhibit 34.

Tag	Type	Status	Commissioned
14AF20000000020000000055	Plant	Voided	12/10/2017 03:52 am

Exhibit 34: The Voided Tags Page

1

**Tag**

Tag

This is the unique identification number (UID) printed on the physical tag.

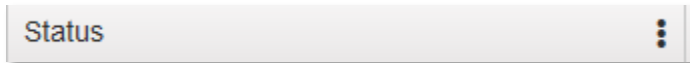
2

**Type**

Type

This is an indicator of the type of product to be tagged. The tag *Types* are *Plant* and *Package*.

3

**Status**

The status of the tags on the *Voided* tab should be listed as *Voided*.

4

**Commissioned**

This field contains the date/time the tags were generated and associated with the facility by Metrc.



## 5 Plants

Plants are tagged at the immature lot growth phase and at the mature / flowering growth phase.

### 5.1 Immature Plant Lot Tag Attachment



Exhibit 35: Immature Plant Lot Tag Attachment

The UID number (plant tag shown in Exhibit 35) is assigned to an immature plant lot of up to 100 seeds or immature plants. Each seed or immature plant in the lot must be labelled with the corresponding UID number of the lot. Please note that the individual immature plant UID labels are not provided by Metrc. The required corresponding UID number labels will need to be produced by the licensee. Immature plant UID labels can be affixed to the container which holds the individual immature plant, attached to the plant itself, and affixed in a form or manner that facilitates identification of the individual immature plant(s) in the designated immature plant lot. Once the immature lot has been established in Metrc, the death of an immature plant(s) must be recorded in Metrc by recording the associated waste amount and reducing the total number of the immature plants in the lot for each immature plant that was destroyed.

### 5.2 Attaching Tag to Plant

Plant tags are assigned to individual plants when they are moved to a designated canopy area, or when the plant begins flowering. They must be attached to the main stem at the base of each plant using a tamper-resistant strap or zip tie. Exhibit 36 shows some examples of plant tags during various stages of cultivation. Please note these pictures show plant tags used in other states, not those that are used in California.



Exhibit 36: Examples of Plant Tags during Various Stages of Cultivation

### 5.3 Recording Plant and Harvest Information

Information about handling and recording information in Metrc includes the following:

1. A plant can be destroyed anytime during the growth phases shown in Exhibit 37. Any waste produced by the plant should be recorded prior to the destruction.
2. Any waste created during the immature growth phase must be recorded as waste using the *Plant Waste* function and destroyed.
3. When immature plants begin to flower, select the *Change Growth Phase* button to record the change and associate the new *Plant Tag ID* to the plant(s).
4. In Metrc, anytime something is trimmed from a flowering plant during growing with the intent to sell it, process it, or perform a partial harvest, a *Manicure* batch must be created.
5. Harvest steps include the following:
  - A. Harvest Name – Harvests must be strain specific. The *Harvest Name* must be unique. It is a best practice for the harvest name to include the *Strain Name* and *Harvest Date*, but it is not required by the State.
  - B. Weight – The plant is weighed individually in its entirety after being cut from root ball (stem, stalk, bud/flower, leaves, trim leaves, etc.).
  - C. Waste – This can be recorded using multiple entries but must be reported within three days of destruction.
  - D. Package – Package and tag the product from the *Harvest Batch* (*Fresh Cannabis Plant*, *Flower*, *Leaf* or *Kief*). These packages must be strain specific.
  - E. Transfer – Licensee must create transfer manifest to move product to a Processor, Distributor, or Manufacturer.
  - F. Finish – When the *Harvest Batch* (HB) has been fully packaged, there should be remaining wet weight to account for moisture loss. Selecting *Finish Harvest* will attribute any remaining weight to moisture loss.
6. A *Harvest Batch* package of *Flower*, *Leaf*, *Kief* or *Fresh Cannabis Plant* can only be created from the *Harvested Tab* using a single strain from plants harvested at the same time.
7. Plant tags may only be used once and may not be reused.

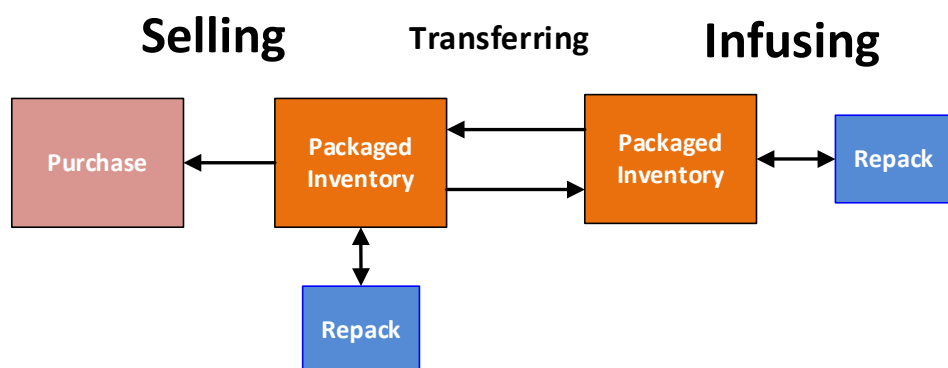
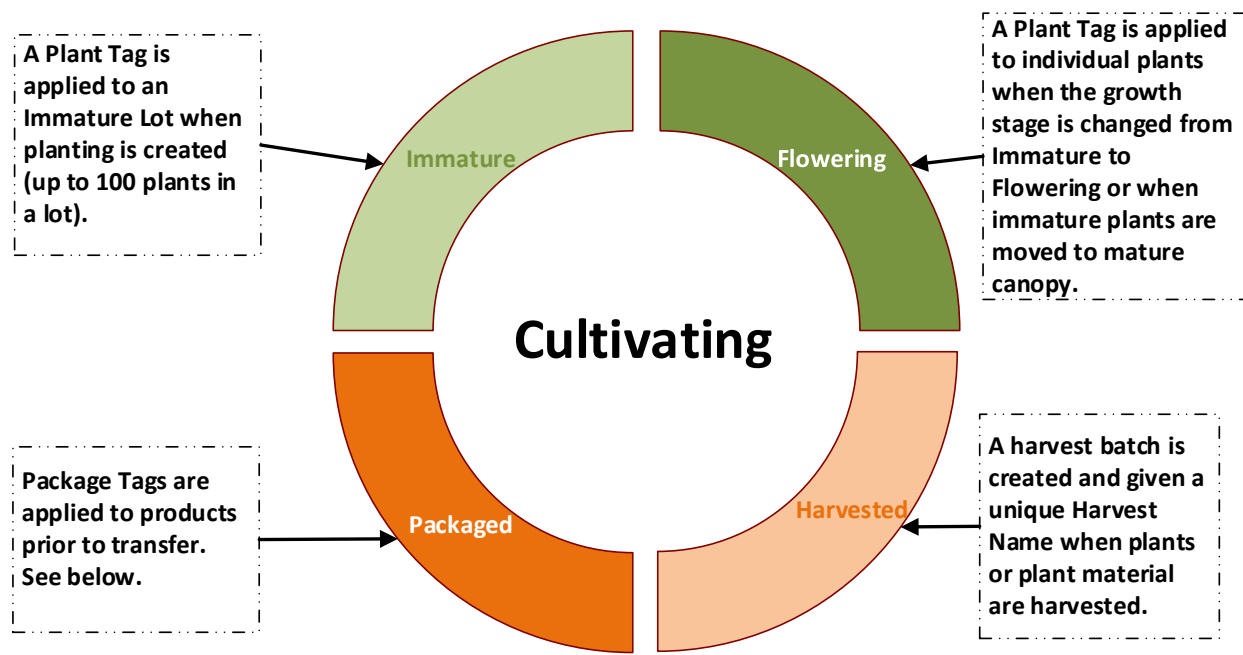


Exhibit 37: Steps in the Cultivation Process

### 5.3.1 Plant Waste

The following guidelines apply to plant waste:

1. Plant waste must be recorded within three business days of destruction. In Metrc plant waste can be recorded by *Immature Plant Lot*, *Flowering Plant* or by *Location*.
2. Waste can also be recorded by *Harvest Batch*. See Metrc User Guide for details.
3. When recording *Flowering Plant* waste, the waste from multiple plants can be recorded as a single waste event but the flowering plants contributing to the waste must be individually identified.
4. If a plant is no longer viable, the waste must be recorded prior to recording its destruction.
5. The reason for the waste must be identified using the *Waste Reasons* defined by the State of California as listed in Exhibit 38 below. Use of some *Waste Reasons* may be limited to certain license types, as determined by the State.

Waste Reason	Reason Usage
<b>Contamination</b>	<i>Degradation of plant(s) by environmental elements such as pests, filth/foreign material, mold/mildew.</i>
<b>Contamination (BCC)</b>	<i>Degradation of plant(s) by environmental elements such as pests, filth/foreign material, mold/mildew. Displays for BCC licensees only.</i>
<b>Damage</b>	<i>Damage to the plant(s).</i>
<b>Damage (BCC)</b>	<i>Damage to the plant(s). Displays for BCC licensees only.</i>
<b>Failure to Thrive</b>	<i>Failure to grow or develop vigorously.</i>
<b>Failure to Thrive (BCC)</b>	<i>Failure to grow or develop vigorously. Displays for BCC licensees only.</i>
<b>Male Plants</b>	<i>The plant(s) is male.</i>
<b>Male Plants (BCC)</b>	<i>The plant(s) is male. Displays for BCC licensees only.</i>
<b>Mandated Destruction</b>	<i>Cannabis plant(s) is destroyed as a result of a State– or local authority–mandated or –supervised process.</i>
<b>Pesticides</b>	<i>Improper usage and application of pesticides on plant(s).</i>

Waste Reason	Reason Usage
Pruning	<i>Cannabis byproduct produced during pruning of plant(s).</i>

Exhibit 38: State of California Waste Reasons

### 5.3.1.1 Record Immature Plant Lot Waste

On the *Immature* tab in the *Plants* area, select the *Record Waste* button shown in Exhibit 39 to access the *Record Plant Batches Waste* page.

The screenshot shows the 'Record Plant Batches Waste' form. It includes the following elements with numbered callouts:

- 1**: Waste Method Drop-Down (labeled 'Waste Method - Select -')
- 2**: Material Mixed (text input field)
- 3**: Waste Weight (text input field with 'ex. 100.23' and a unit drop-down)
- 4**: Reason Drop-Down (labeled 'Reason - Select -')
- 5**: Optional Note | Required Note (text input field)
- 6**: Waste Date (calendar icon, text input with 'mm/dd/yyyy', and 'today' button)
- 7**: Plant Batch Lookup (text input with 'Type part of Plant Batch name...' and a search icon)
- 8**: Add Button (+ icon)
- 9**: Clear Button (labeled '(clear)')
- 10**: Record Waste Button (green button)
- 11**: Cancel Button (gray button)

Exhibit 39: The Record Plant Batches Waste Page

1

#### Waste Method Drop Down

The close-up shows the 'Waste Method' drop-down menu with the text '- Select -' and a downward arrow.

Use this drop-down to identify how the waste was handled. Waste methods defined by the State are: *Compost*, *Self-Hauler*, or *Waste-Hauler*.

2

**Material Mixed**

Material Mixed

Specify any material that was combined with the waste while performing the *Waste Method*. If the *Waste Method* did not require this step, enter *None*.

3

**Waste Weight**

Waste Weight

Enter the weight of the waste.

4

**Reason Drop Down**

Reason

Use this drop-down to explain why the waste occurred. *Waste Reasons* defined by the State are listed in Exhibit 38 above. Use of some *Waste Reasons* may be limited to certain license types, as determined by the State.

5

**Optional Note/Required Note**

Optional Note

Use the *Optional Note* or *Required Note* field to provide additional information related to the waste. The field will be optional or required depending on the selected reason.

6

**Waste Date**

Waste Date

Enter the date the waste event occurred.

7

**Plant Batch**

Plant Batch

Specify the *Immature Plant Lot* that produced the waste.

8

**Add Button**

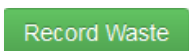
Select this button to create another batch of immature plant waste simultaneously.

9

**Clear Button**

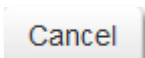
Select this button to clear the current information that has been entered into the fields for the waste record.

10

**Record Waste Button**

Select this button to save the waste record in Metrc.

11

**Cancel Button**

Select this button to disregard the entries on the *Record Plant Batches Waste* page.



### 5.3.1.2 Record Flowering Plant Waste

On the *Flowering* tab in the *Plants* area, select the *Record Waste* button to access the *Record Flowering Plant Waste* page shown in Exhibit 40.

The screenshot shows the 'Record Flowering Plants Waste' window. It contains the following elements with numbered callouts:

- 1**: Waste Method Drop-Down (labeled 'Waste Method - Select -')
- 2**: Material Mixed input field
- 3**: Waste Weight input field (labeled 'ex. 100.23')
- 4**: Reason Drop-Down (labeled 'Reason - Select -')
- 5**: Optional Note input field
- 6**: Waste Date input field (labeled 'mm/dd/yyyy today')
- 10**: Add Button (+)
- 11**: Clear Button (labeled '(clear)')
- 9**: Subtract Plant Button (labeled 'e')
- 7**: Plant Lookup button (labeled 'Q')
- 8**: Add Plants Button (labeled '(plants)')
- 12**: Record Waste Button
- 13**: Cancel Button

Exhibit 40: The Record Flowering Plant Waste Page

1

#### Waste Method Drop Down

The image shows a close-up of the 'Waste Method' drop-down menu, which currently displays '- Select -'.

Use this drop-down to identify how the waste was handled. Waste methods defined by the State are: *Compost*, *Self-Hauler*, or *Waste-Hauler*.

2

#### Material Mixed

The image shows a close-up of the 'Material Mixed' input field, which is currently empty.

Specify any material that was combined with the waste while performing the *Waste Method*. If the *Waste Method* did not require this step, enter *None*.

3

**Waste Weight**

 The form shows a label 'Waste Weight' followed by a numeric input field containing 'ex. 100.23' and a dropdown menu with the text '- Select -'.

Enter the weight of the waste.

4

**Reason Drop Down**

 The form shows a label 'Reason' followed by a dropdown menu with the text '- Select -'.

Use this drop-down to explain why the waste occurred. *Waste Reasons* defined by the State are listed in Exhibit 38 above. Use of some *Waste Reasons* may be limited to certain license types, as determined by the State.

5

**Optional Note/Required Note**

 The form shows a label 'Optional Note' followed by a text input field.

Use the *Optional Note* or *Required Note* field to provide additional information related to the waste. The field will be optional or required depending on the selected reason.

6

**Waste Date**

 The form shows a label 'Waste Date' followed by a calendar icon, a text input field with the placeholder 'mm/dd/yyyy', and a 'today' button.

Enter the date the waste event occurred.

7

**Plant**

 The form shows a label 'Plant # 1' followed by a text input field with the placeholder 'Type part of Plant number...' and a magnifying glass icon.

Use this field to select the *Flowering Plant* that produced the waste. Type part of the number, or use the magnifying glass to display a list of all plants.

8

**Add Plants Button**

 The form shows a button with a plus icon and the text '(plants)'.

Select this button to select additional *Flowering Plants* which participated in producing the waste.

9

**Subtract Plants Button**

Select this button to remove *Flowering Plants* previously specified as having contributed to the waste.

10

**Add Button**

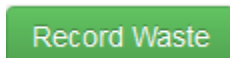
Select this button to create another waste event simultaneously.

11

**Clear Button**

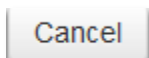
Select this button to clear the current information that has been entered into the fields for the waste record.

12

**Record Waste Button**

Select this button to save the waste record.

13

**Cancel Button**

Select this button to disregard the entries on the *Record Flowering Plant Waste* page.

### 5.3.1.3 Record Waste by Location

On the Waste tab in the Plants area, select the Record Waste by Location button to access the *Record Location Plants Waste* page shown in below.

The screenshot shows the 'Record Location Plants Waste' form. It includes a title bar with a close button (X). Below the title bar is a section for 'Location Waste # 1' with a '(clear)' button. The form contains several input fields and buttons, each labeled with a numbered callout:

- 1** Waste Method: A drop-down menu currently showing '- Select -'.
- 2** Material Mixed: A text input field.
- 3** Waste Weight: A text input field with 'ex. 100.23' and a unit drop-down menu showing '- Select -'.
- 4** Reason Drop-Down: A drop-down menu currently showing '- Select -'.
- 5** Optional Note: A text input field.
- 6** Waste Date: A date picker showing 'mm/dd/yyyy' and a 'today' button.
- 7** Location: A text input field with a search icon and a placeholder 'Type part of Location name...'.
- 8** Add Button: A blue button with a plus sign and a quantity input field showing '1'.
- 9** Clear Button: A blue button labeled '(clear)'.
- 10** Record Waste Button: A green button labeled 'Record Waste'.
- 11** Cancel Button: A white button labeled 'Cancel'.

Exhibit 41: The Record Plant Waste by Location Page

1

#### Waste Method Drop Down

A close-up of the 'Waste Method' drop-down menu. The text 'Waste Method' is on the left, and the selected option is '- Select -'.

Use this drop-down to identify how the waste was handled. Waste methods defined by the State are: *Compost*, *Self-Hauler*, or *Waste-Hauler*.


2

#### Material Mixed

A close-up of the 'Material Mixed' text input field. The text 'Material Mixed' is on the left, and the input field is empty.

Specify any material that was combined with the waste while performing the *Waste Method*. If the *Waste Method* did not require this step, enter *None*.

3

**Waste Weight**

 The form shows a label 'Waste Weight' followed by a numeric spinner box containing 'ex. 100.23' and a dropdown menu with '- Select -'.

Enter the weight of the waste.

4

**Reason Drop Down**

 The form shows a label 'Reason' followed by a dropdown menu with '- Select -'.

Use this drop-down to explain why the waste occurred. *Waste Reasons* defined by the State are listed in Exhibit 38 above. Use of some *Waste Reasons* may be limited to certain license types, as determined by the State.

5

**Optional Note/Required Note**

 The form shows a label 'Optional Note' followed by a text input field.

Use the *Optional Note* or *Required Note* field used to provide additional information related to the waste. The field will be optional or required depending on the selected reason.

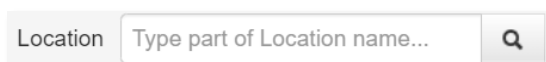
6

**Waste Date**

 The form shows a label 'Waste Date' followed by a calendar icon, a text input field with 'mm/dd/yyyy', and a 'today' button.

Enter the date the waste event occurred.

7

**Location**

 The form shows a label 'Location' followed by a text input field with 'Type part of Location name...' and a magnifying glass icon.

Use this field to select the *Location* containing flower plants that produced the waste. Type part of the number, or use the magnifying glass to display a list of all locations.

8

**Add Button**

Select this button to create another waste event simultaneously.

9

**Clear Button**

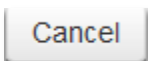
Press this button to clear the current information that has been entered into the fields for the waste record.

10

**Record Waste Button**

Press this button to save the waste record.

11

**Cancel Button**

Press this button to disregard the entries on the *Record Location Plants Waste* page.

### 5.3.1.4 Waste History

The waste events recorded for *Immature Plant Lots* and *Flowering Plants* and by *Location* display on the *Plant Waste* page shown in Exhibit 42. The *Plant Waste* page is available under the *Plants* menu.

The screenshot shows the 'Plant Waste' interface. At the top, a green header bar contains the title 'Plant Waste' and a user identifier 'Cannabis Farms | CML17-0000001'. Below the header, a 'Record Waste by Location' button is on the left, and a set of icons (print, filter, menu, download) is on the right. The main area contains two tables. The first table has columns: Waste Method, Material Mixed, Waste, Reason, Total Plants, Waste Date, and Plant Batch. It shows two rows: 'Waste-Hauler' and 'Compost'. The second table has columns: Tag, Current State, Current Phase, Location, and Waste Weight. It shows one row with a tag starting with '1A4FF'. Below the second table, there are two pagination controls, each showing 'Page 1 of 1' and '20 rows per page'. On the right side of the pagination, there are two status indicators: 'Viewing 1 - 1 (1 total)' and 'Viewing 1 - 2 (2 total)'. Numbered callouts point to the following elements: 1. Waste Method, 2. Material Mixed, 3. Waste, 4. Reason, 5. Total Plants, 6. Waste Date, 7. Plant Batch, 8. Drop-Down Menu Arrow, 9. Tag, 10. Current State, 11. Current Phase, 12. Location, 13. Waste Weight, 14. Record Waste by Location Button.

Waste Method	Material Mixed	Waste	Reason	Total Plants	Waste Date	Plant Batch
Waste-Hauler	None	0.25 kg	Contamination	75	03/19/2018	1A4FF0000000022000000275
Compost	Soil	0.5 lb	Failure to Thrive	1	02/12/2019	

Tag	Current State	Current Phase	Location	Waste Weight
1A4FF0000000022000000953	Destroyed	Flowering	Flower Room B	0.5 lb

Page 1 of 1, 20 rows per page

Viewing 1 - 1 (1 total)

Viewing 1 - 2 (2 total)

Exhibit 42: The Plant Waste Page

1

**Waste Method**A light gray rectangular button with the text "Waste Method" in black. To the right of the text is a vertical ellipsis icon consisting of three small black dots.

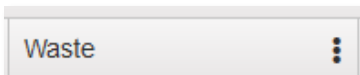
This field identifies how the waste was handled. Waste methods defined by the State are: *Compost*, *Self-Hauler*, or *Waste-Hauler*.

2

**Material Mixed**A light gray rectangular button with the text "Material Mixed" in black. To the right of the text is a vertical ellipsis icon consisting of three small black dots.

This field displays any material that was combined with the waste while performing the *Waste Method*.

3

**Waste**A light gray rectangular button with the text "Waste" in black. To the right of the text is a vertical ellipsis icon consisting of three small black dots.

This field displays the weight of the waste produced.

4

**Reason**A light gray rectangular button with the text "Reason" in black. To the right of the text is a vertical ellipsis icon consisting of three small black dots.

This field explains why the waste occurred. *Waste Reasons* defined by the State are shown Exhibit 38 above.

5

**Total Plants**A light gray rectangular button with the text "Total Plants" in black. To the right of the text is a vertical ellipsis icon consisting of three small black dots.

This field displays the total number of plants that produced the waste.

6

**Waste Date**A light gray rectangular button with the text "Waste Date" in black. To the right of the text is a vertical ellipsis icon consisting of three small black dots.

This field displays the date the waste event took place.



7

**Plant Batch**

Plant Batch

This field displays the *Immature Plant Lot* that produced the waste. This field will be blank for *Flowering Plant* waste.

8

**Drop-Down Menu Arrow**

This arrow indicates that the file has additional detail available for viewing. Selecting this arrow displays information on the *Flowering Plants* that contributed to the waste event, as shown in Exhibit 43.

Waste Method	Material Mixed	Waste	Reason	Total Plants	Waste Date	Plant Batch
Self-Haul	Soil	10 g	Pruning	4	04/11/2018	
Tag	Current State	Current Phase	Location	Waste Weight		
1A4FF0000000022000000022	Destroyed	Flowering	Flower Room B	2.5 g		
1A4FF0000000022000000023	Destroyed	Flowering	Flower Room C	2.5 g		
1A4FF00000000220000000438	Harvested	Flowering	Immature Room C	2.5 g		
1A4FF00000000220000000580	Destroyed	Flowering	Flower Room C	2.5 g		

Exhibit 43: The Drop-Down Menu Arrow Expands Waste Detail

9

**Tag**

Tag

This field displays the *Tag ID* of the *Flowering Plant* that contributed to the waste event.

10

**Current State**

Current State

This field displays the *Current State* of the *Flowering Plant* that contributed to the waste event.

11

**Current Phase**

Current Phase

This field displays the *Current Phase* of the *Flowering Plant* that contributed to the waste event.

12

**Location**A light gray rectangular field with the text "Location" on the left and three vertical dots on the right.

This field displays the location where the *Flowering Plant* that contributed to the waste event is located.

13

**Waste Weight**A light gray rectangular field with the text "Waste Weight" on the left and three vertical dots on the right.

This field displays the *Waste Weight* (the total waste weight divided by the number of *Flowering Plants* that contributed to the waste event).

## 6 Packages

Information relating to the package process includes the following:

1. Immature plants and seeds can be packaged by a nursery and transported by a distributor to a cultivator, distributor or retailer for sale.
2. When a manufacturer is creating a concentrate that will then be used in multiple infused production batches, the concentrate must be created as a new package. The infused production batches will then be created from the concentrate package.
  - A. The new package of concentrate is a production batch and will then be partially used in an infused product or sold to a customer.
  - B. This makes it more easily recorded as connected to the finished infused product package.
3. Packages made at a manufacturer facility that creates concentrates must be created by pulling from other packages.
4. A package must exist in order for it to be selected for transfer. Transfers are real-time inventory dependent.
5. There must be a contents section for each new package created from an existing package.
6. When adjusting a package, use the appropriate adjustment reason.
7. In order for a distributor to send a sample for testing, a test sample package must be created. A new test sample must have a new RFID package tag and be pulled from an existing package.
8. Package tags may only be used once and may not be reused.

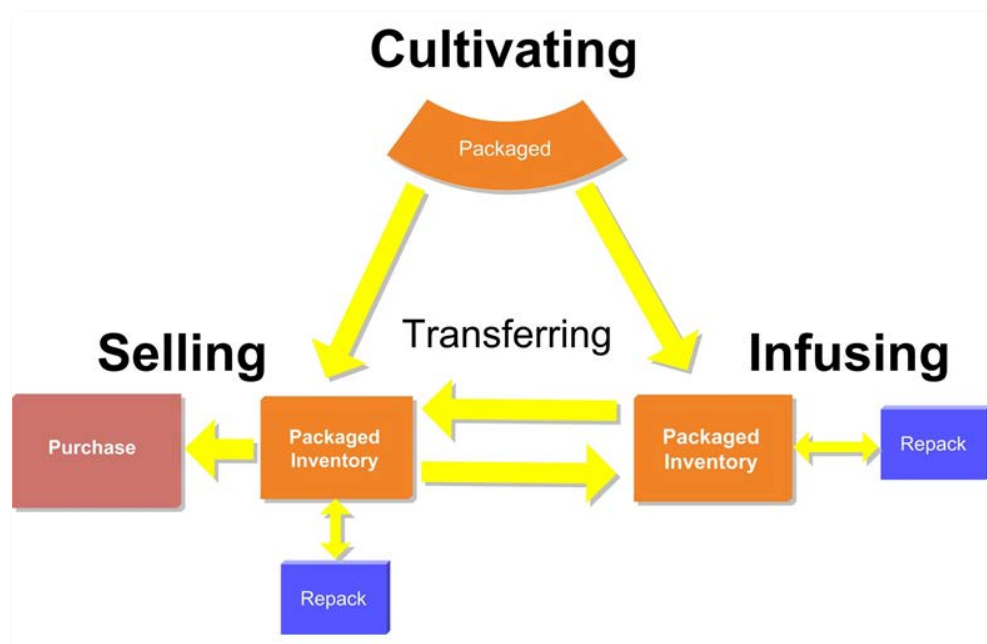


Exhibit 44: The Package Life Cycle

## 6.1 Package Tag

The *Package Tag* is designed to identify and track the chain of custody of cannabis and cannabis products. It breaks into two (2) pieces as described below, and uses a pressure sensitive adhesive so the tag can be affixed to the associated package.



Exhibit 45: Package Tag



The *Package Tags* are perforated, as shown in Exhibit 45.

2

### Upper Portion



The *Upper Portion* stays with the package as shown in Exhibit 46 below.



Exhibit 46: The Upper Portion of the Tag Remains with the Package

3

### Lower Portion



The *Lower Portion* can be used to label a display container or lab paperwork in order to identify the associated Package. All buds must be in final package form. Bud jars are not allowed.

### 6.1.1 Package Tag Details

The detailed information printed on each *Package Tag* as marked in Exhibit 47 is described below.



Exhibit 47: Package Tag Information

1

#### License Facility Name

**CANNABIS FARMS, LLC**

The *License Facility Name* is identified on the package tag.

2

#### Facility License Number

**CML18-9999999**

The *Facility License Number* is printed on the package tag.

3

#### Package Tag Order Number

**Order #9999-999-999999**

The *Package Tag Order Number* is printed on the *Package Tag*. This identifies which order number this particular *Package Tag* was a part of.

4

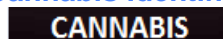
#### Unique Tag Number



The unique individual ID (UID) number is encoded on the tag in numeric, barcode, and radio frequency ID (RFID) formats. The barcode printed on the tag is a standard UCC 128 barcode. Metrc generates the ID numbers automatically and assigns them to a facility.

5

#### Cannabis Identifier



*Cannabis* is printed on the package tag to easily identify that the package contains cannabis or a cannabis product.

## 6.2 Package Search

The *Packages* page is accessed by selecting *Packages* in the top navigation bar. Clicking on the *Active* tab displays active packages in the inventory of the licensee as shown in Exhibit 48.

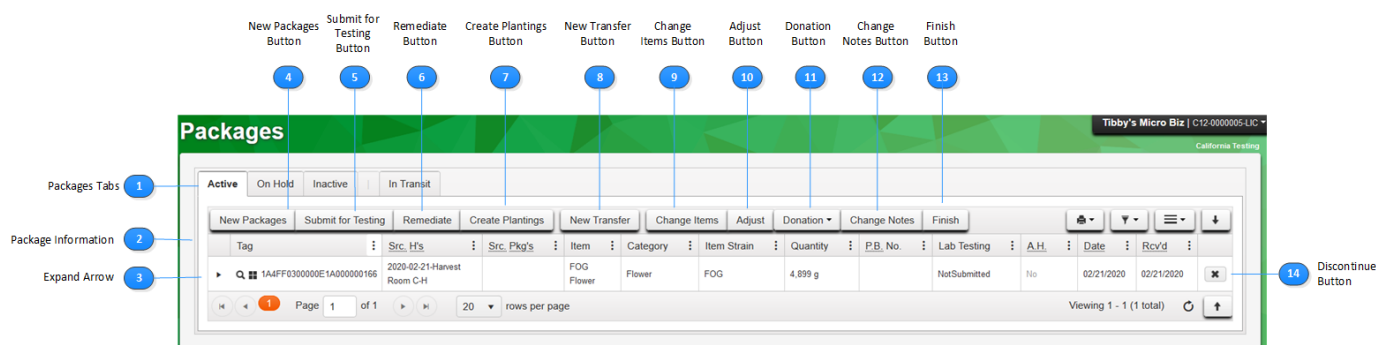
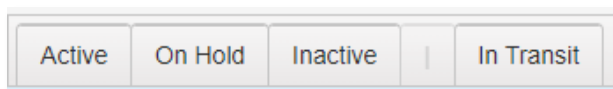


Exhibit 48: The Packages Page

A user can search for a package in the license inventory by filtering and sorting on the columns in the package grid. See Section 3.5 for information on using the filter functionality in Metrc.

### 1 Package Tabs



Only packages in the inventory of the licensee may be viewed. The available tabs include: *Active*, *On Hold* and *Inactive*.

The *Active* tab shows the active packages currently at the facility.

The *On Hold* tab displays any packages that have been placed on administrative hold by the State of California.

The *Inactive* tab displays packages that have been discontinued or finished and are no longer active at the facility.

The *In Transit* tab displays packages currently in an active outgoing transfer (*Transfer Status* of *Shipped*) or in an active rejected transfer (*Transfer Status* of *Rejected*).



2

## Package Information

Tag	Src. H's	Src. Pkg's	Item	Category	Item Strain	Quantity	P.B. No.	Lab Testing	A.H.	Date	Rec'd
-----	----------	------------	------	----------	-------------	----------	----------	-------------	------	------	-------

Each of these fields can be used to sort and filter the package data. Additional columns are hidden by default, but can be shown using the *Columns Settings* menu. See Section 3.5.2 for information on changing the *Column Settings*.

3

## Expand Arrow



This arrow indicates that there is additional detail available for the row.

Selecting the expand arrow next to a *Package* displays tabs containing *Lab Results* (if applicable) and the *History* of the package. The *Lab Results* tab is selected in the example shown in Exhibit 49.

Tag	Src. H's	Src. Pkg's	Location	Item	Category	Item Strain	Quantity	P.B. No.	Lab Testing	A.H.	Date	Rec'd
1A4FF0300000E1A000000130	2019-12-27-Harvest Room A-M	1A4FF0300000E1A000000108	Package Location 5	Skywalker Flower	Flower	Skywalker	3 g		TestPassed	No	02/10/2020	

<div>Lab Results History</div> <table> <tr> <th>Test Date</th><th>Overall</th><th>Test Name</th><th>Test Passed</th><th>Result</th><th>Notes</th><th>Released</th><th>Sample Package</th><th>Item</th><th>Category</th><th></th><th></th></tr> <tr> <td>02/04/2020</td><td>Passed</td><td>CBC % (additional)</td><td>Passed</td><td>0</td><td></td><td>02/10/2020 02:19 pm</td><td>1A4FF0300000E1A000000118</td><td>Skywalker Flower</td><td>Flower</td><td></td><td></td></tr> </table> <div>Page 1 of 1 20 rows per page Viewing 1 - 1 (1 total)</div>												Test Date	Overall	Test Name	Test Passed	Result	Notes	Released	Sample Package	Item	Category			02/04/2020	Passed	CBC % (additional)	Passed	0		02/10/2020 02:19 pm	1A4FF0300000E1A000000118	Skywalker Flower	Flower		
Test Date	Overall	Test Name	Test Passed	Result	Notes	Released	Sample Package	Item	Category																										
02/04/2020	Passed	CBC % (additional)	Passed	0		02/10/2020 02:19 pm	1A4FF0300000E1A000000118	Skywalker Flower	Flower																										

Exhibit 49: Package Details

## Lab Results

The *Lab Results* tab displays the details of each individual lab test performed on the package. A *Document Download* button is available on each row on the *Lab Results* tab to view the associated certificate of analysis (COA), which the laboratory staff uploads when test results are recorded. The test results and COA are available on the source package and any related packages only after the laboratory staff releases the results.

## History

The *History* tab displays a log of every event related to the package.

## Req'd (Required) Lab Test Batches


The *Req'd Lab Test Batches* tab displays only for packages containing lab test samples. This tab shows the list of *Lab Test Batches* marked as required by the licensee when creating the test sample. California is not currently utilizing this feature of Metrc, so no data will be populated on the *Req'd Lab Test Batches* tab.

4

**New Packages Button**A rectangular button with a light gray background and a thin black border. The text "New Packages" is centered in a dark gray font.

Select this button to launch the *New Packages* page to record starting inventory during initial transition, to re-package an existing package, to split a package into multiple packages, or to combine multiple packages into a single package. This button is also used to record product remediation when the package that failed laboratory testing is remediated and re-packaged.

5

**Submit for Testing Button**A rectangular button with a light gray background and a thin black border. The text "Submit for Testing" is centered in a dark gray font.

Select this button to launch the *Submit for Testing* page to create a sample package for laboratory testing. This button is enabled only for Distributors and Microbusinesses.

6

**Remediate Button**A rectangular button with a light gray background and a thin black border. The text "Remediate" is centered in a dark gray font.

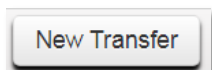
Select this button to launch the *Remediate Packages* page to record the remediation of a package that failed laboratory testing if the product and remediation method did not require the remediated product be re-packaged. Otherwise, select the *New Packages* button to record the product remediation. This button is enabled only for Manufacturers and Microbusinesses.

7

**Create Plantings Button**A rectangular button with a light gray background and a thin black border. The text "Create Plantings" is centered in a dark gray font.

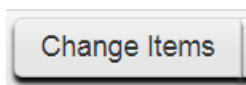
Select this button to launch the *Create Plantings from Packages* page to create a new immature plant lot from a package of immature plants. This button is enabled only for Cultivators and Microbusinesses.

8

**New Transfer Button**

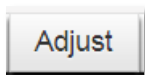
Select this button to launch the *New Transfer* page to transfer a package(s) to another annual licensee.

9

**Change Items Button**

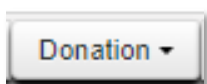
Select this button to launch the *Change Items* page to update the *Item* designated for the package. The *Item* can be changed within 24 hours of creating the package.

10

**Adjust Button**

Select this button to launch the *Adjust Packages* page to update the quantity contained in a package.

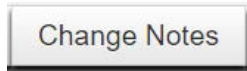
11

**Donation Button**

From the *Donation* button drop-down menu, select the *Add* option to designate an existing package for donation or select the *Remove* option to remove a designation made by the license. Use of this button is limited to packages created by the licensee.

**Important Note:** Licensees cannot remove the donation designation made by another licensee or after the donated item has been transferred and accepted into the inventory of another licensee.

12

**Change Notes Button**

Select this button to launch the *Change Notes* page to update the *Note* associated with the package. The *Notes* can be viewed by hovering over the magnifying glass icon to the left of the package tag. This button is only enabled for users with the *Manage Notes* permission.

13

**Finish Button**

Select this button to launch the *Finish Packages* page to inactivate a package with a quantity of zero.

14

**Discontinue Button**

Select this button to discontinue a package that was created in error. Once a package has been modified in any way or transferred, it can no longer be discontinued.

## 6.3 Creating Packages from Harvest Batch

Creating packages from a harvest batch is initiated by selecting the *Create Packages* button on the *Plants* page - *Harvested* tab.

The screenshot shows the 'Create Packages' dialog box with the following numbered callouts:

- 1: New Tag (text input field)
- 2: Location (text input field)
- 3: Item (text input field)
- 4: Quantity/Unit of Measure Drop-down (dropdown menu)
- 5: Note (text input field)
- 6: Package Date (calendar icon and text input field)
- 7: Donation Checkbox (checkbox)
- 8: Production Batch Checkbox (checkbox)
- 9: Add New Package Button (+ icon)
- 10: Harvest Batch (text input field)
- 11: Subtract Contents Button (- icon)
- 12: Quantity/Unit of Measure Drop-down (dropdown menu)
- 13: Add Contents Button (+ icon)
- 14: Create Packages Button (green button)
- 15: Cancel Button (grey button)
- 16: Clear Button (clear icon)

Exhibit 50: Creating Packages from Harvest Batch

1

### New Tag

New Tag Type part of the Tag number... 🔍

Use this field to identify a specific *Metric Package Tag* to be associated with this package being made. Select the look-up button 🔍 to display a list of *Package Tag* numbers currently available for use.

2

### Location

Location Type part of the Location name... 🔍

This field is not currently in use in California.

3

**Item**

Item

Select the look-up button  to identify the item contained in the new package.

4

**Quantity/Unit of Measure Drop-down**

Quantity

Use this drop-down to choose the weight-based unit of measure for this package. The *Quantity* of the new package is calculated based on the weight taken from the source harvest(s).

5

**Note**

Note

Use the *Note* field to provide additional information related to the package. The field is optional.

6

**Package Date**

Package Date

Enter the date the package is being created or use the *today* button to enter the current date.

7

**Donation Checkbox**

☐ Donation

Mark this checkbox to designate the new package for donation.

8

**Production Batch Checkbox**

☐ Production Batch

Not currently in use in California for harvest packages.

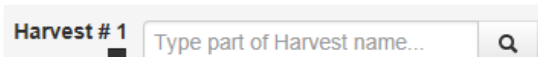
9

**Add New Package Button**

 A button with a blue square containing a white plus sign, followed by a text input field containing the number '1'.

To create multiple packages simultaneously, enter the number of packages to be created and select the add button..

10

**Harvest Batch**

 A search bar with the text 'Harvest # 1' on the left, a text input field with the placeholder 'Type part of Harvest name...', and a magnifying glass icon on the right.

Specify the *Harvest Batch* this particular package should be pulled from. Use the magnifying glass to display a list of all active harvest batches.

11

**Subtract Contents Button**

Select this button to remove a source harvest for the new package. Keep in mind that every package must have a contents section.

12

**Quantity/Unit of Measure Drop-down**

 A form with three parts: a label 'Quantity', a text input field with 'ex. 100.23', and a drop-down menu with '- Select -' and a downward arrow.

Enter the weight of the product being taken from the harvest and put into the current package. Use the drop-down to identify the unit of measure for the quantity entered.

13

**Add Contents Button**

 A blue square button with a white plus sign and the text '(contents)' in parentheses.

Select this button to add another source harvest, if pulling inventory from multiple harvests.

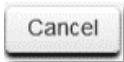
14

**Create Packages Button**

 A green rectangular button with the text 'Create Packages'.

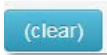
Select this button to create the package(s) in Metrc.

15

**Cancel Button**

Select this button to cancel the *Create Packages* action and return to the previous page.

16

**Clear Button**

Select this button to clear the information that has been entered for the package being created.



## 6.4 Creating Packages from Existing Package(s)

Creating packages from an existing package(s) is initiated by selecting the *New Packages* button on the *Packages* page - *Active* tab.

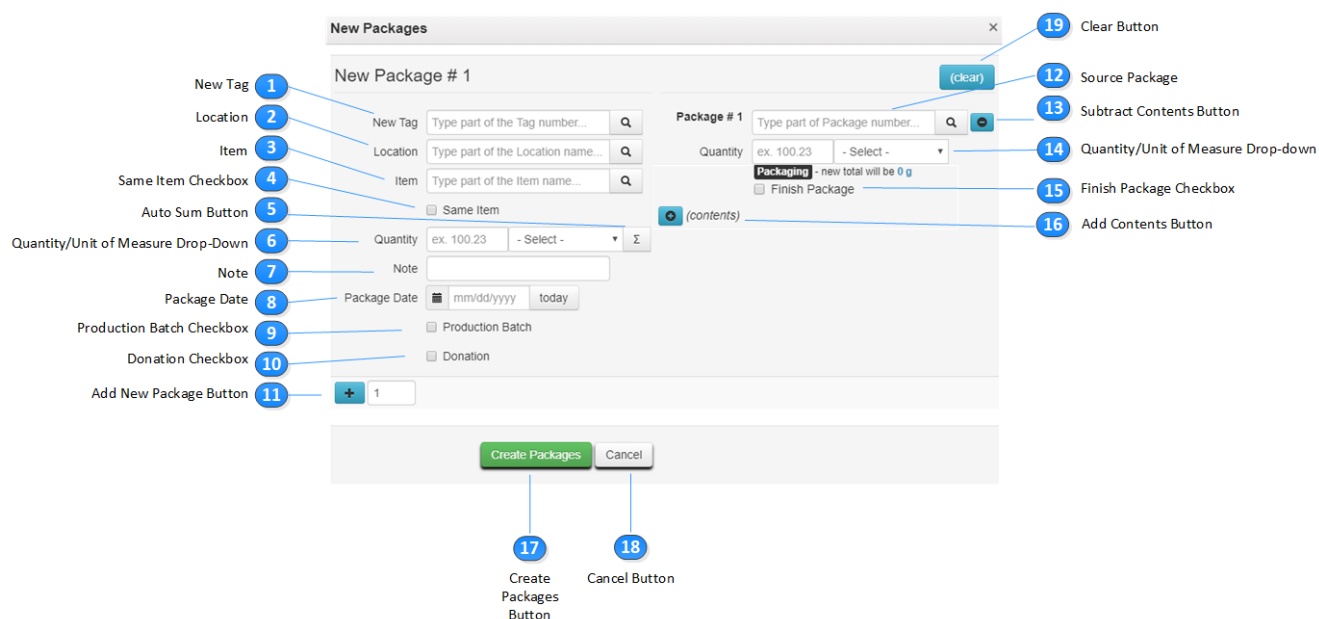


Exhibit 51: Creating Packages from Existing Packages

1

### New Tag

New Tag

Enter the *Package Tag* number associated with the new package being created. Select the look-up button  to display a list of *Package Tag* numbers currently available for use.

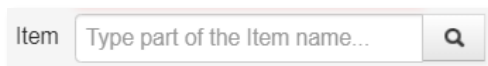
2


### Location

Location

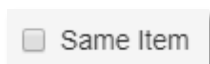
This field is not currently in use in California.

3

**Item**

 A search field with the label 'Item' on the left. The input area contains the placeholder text 'Type part of the Item name...'. To the right of the input area is a magnifying glass icon inside a square button.

Select the look-up button  to identify the item contained in the new package.

4

**Same Item Checkbox**

 A checkbox with the label 'Same Item' to its right.

Mark the *Same Item* checkbox to assign the item associated to the source package to the new package. This option allows licensees who receive packages of an item not previously configured for their license to repackage using the same item name from the source package. Using the *Same Item* feature does not add the item to the list of items for that license.

5

**Auto-Sum Button**

 A button with the Greek letter sigma ( $\Sigma$ ) inside.

After selecting the *Unit of Measure* for the new package, use the *Auto-Sum* button to populate the *Quantity* field for the new package based on the quantity removed from the source package(s).

6

**Quantity/Unit of Measure Drop-down**

 A form element consisting of two adjacent boxes. The first box is labeled 'Quantity' and contains the text 'ex. 100.23'. The second box is a drop-down menu with the text '- Select -' and a downward-pointing arrow.

Enter the weight, volume, or count of items contained in the package being created. Use the drop-down to select the unit of measure for the quantity entered.

7

**Note**

 A text input field with the label 'Note' to its left.

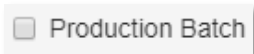
Use the *Note* field to provide additional information related to the package. The field is optional.

8

**Package Date**

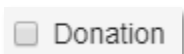

Enter the date the package is being created or use the *today* button to enter the current date.

9

**Production Batch Checkbox**


Use this checkbox to identify a manufactured production batch (such as *Concentrates*, *Infused Edibles*, or *Infused Non-edibles*).

10

**Donation Checkbox**


Mark this checkbox to designate the new package for donation.

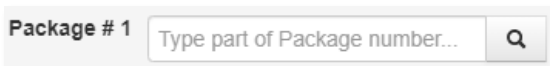
Alternatively, if the source package is designated for donation, leave the *Donation* checkbox unmarked to remove the donation designation on the new package. Only the licensee who designated a package for donation can remove the donation designation, but they can only do so if the donated package has not yet been transferred and accepted into the inventory of another licensee.

11

**Add Button**


To create multiple packages simultaneously, enter the number of packages to be created and select the add button.

12

**Source Package**


Identify the package(s) being pulled from to create the new package.

13

**Subtract Contents Button**

Select this button to remove the current contents of a package. Keep in mind that every package must have a contents section.

14

**Quantity/Unit of Measure Drop-down**

Quantity	ex. 100.23	- Select - ▼
----------	------------	--------------

Enter the quantity of weight-based, volume-based or count-based product(s) being used to create the new package. Use the drop-down to identify the unit of measure for the quantity entered.

15

**Finish Package Checkbox**
☐ Finish Package

If the remaining quantity of a source/content package is calculated to zero (0) when creating a new package, the *Finish Package* checkbox displays. Mark this checkbox to finish the source package at the same time as creating the new package.

16

**Add Contents Button**

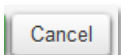
Select this button to add another contents package, if pulling inventory from multiple packages.

17

**Create Packages Button**

Select this button to create the new package(s) in Metrc.

18

**Cancel Button**

Select this button to exit the current page without making any new packages and return to the previous page.

19

**Clear Button**

Use this button to clear all entries that have entered into the current sections.

### 6.4.1 Manufactured Batch Process

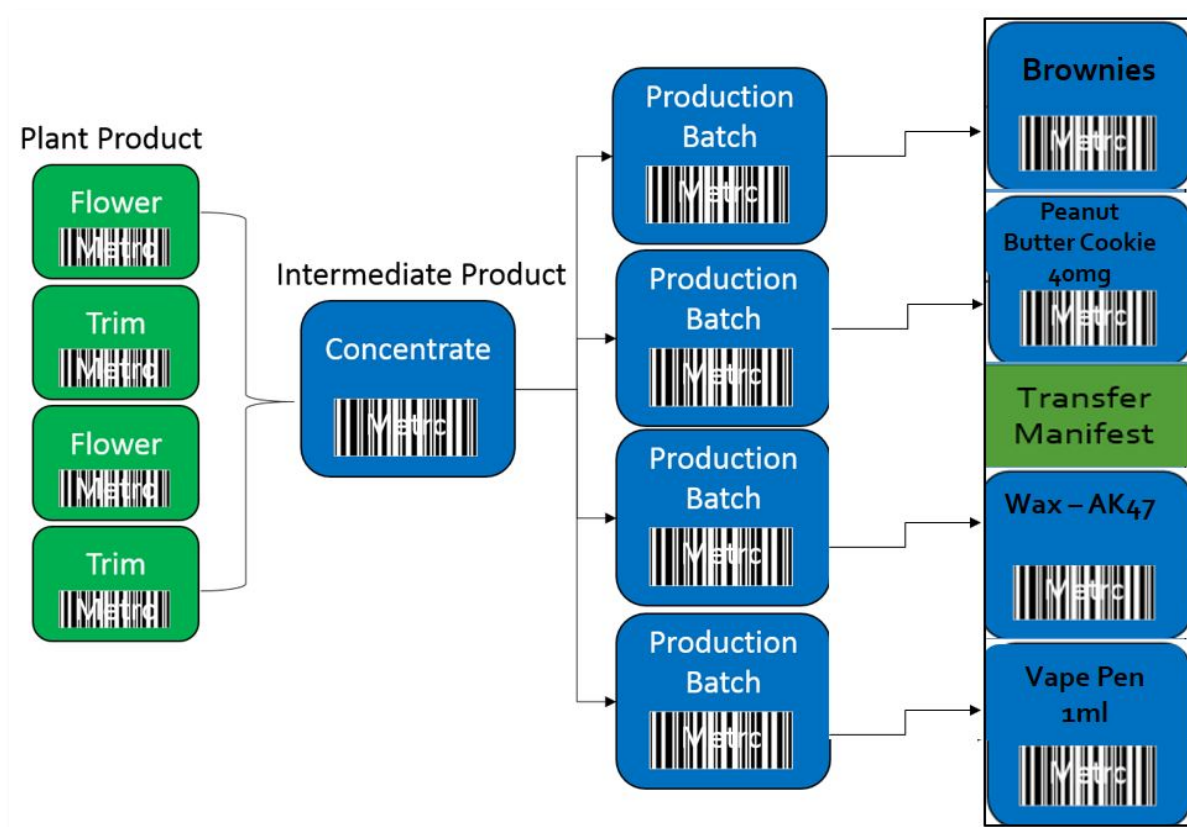


Exhibit 52: Each Unique ID Number Connects to the One that Preceded It

Exhibit 52 shows how several bags of flower and leaf were transferred into the manufacturing facility from another location via the transfer process. The flower and leaf were then converted to an intermediate product (*Production Batch of Concentrate*) for use in a larger batch. In the example above, we could call it butter. The butter is then used to bake a large batch of peanut butter cookies, say 1000. The larger batch of 1000 cookies is then broken down and packaged to be transferred and shipped. Using this example, it is critical to understand that each intermediate step requires a new package tag. Follow the process above and note how each unique ID number is connected to each unique ID number preceding it, and how the chain is kept intact.

## 6.5 Package Adjustments

*Package Adjustments* is a tool to adjust the weight, volume, or quantity of a Metrc package. Adjustments are not used to correct sales in a store. Package adjustment reasons are set by the State. A note section is available for the licensee to explain why that package adjustment was made.

The *Adjust Packages* page shown in Exhibit 53 is accessed by selecting the *Adjust* button option the *Packages* page.

The screenshot shows the 'Adjust Packages' window. It contains the following elements with numbered callouts:

- 1** Package Look-up: A search bar with the placeholder text 'Type part of Package number...' and a magnifying glass icon.
- 2** Quantity: A text input field.
- 3** Adj. Quantity: A text input field with the example value 'ex. -10.5' and a dropdown menu with '- Select -'.
- 4** New Quantity: A text input field with the example value 'ex. 100.23'.
- 5** Reason Drop-down: A dropdown menu with '- Select -'.
- 6** Optional Note | Required Note: A text input field.
- 7** Adj. Date: A date picker showing 'mm/dd/yyyy' and a 'today' button.
- 8** Add Package Button: A button with a '+' icon and a small input field containing '1'.
- 9** Adjust Packages Button: A green button at the bottom.
- 10** Cancel Button: A button at the bottom.

Other visible text includes 'Package # 1', '(clear)', 'Please select a Package.', and 'Adjust Packages' in the window title.

Exhibit 53: The Adjust Packages Page

1

### Package

A close-up of the 'Package' search field. It includes a label 'Package', a search bar with the placeholder text 'Type part of Package number...', and a magnifying glass icon.

Use this field to identify the *Package Tag ID* to be adjusted. The *Package* must be selected before entering values in any other fields on the page.

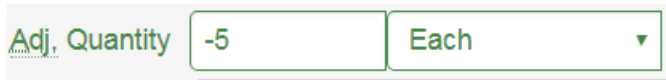
2

### Quantity

A close-up of the 'Quantity' field. It shows a label 'Quantity', a text input field containing the value '195', and a dropdown menu with the value 'Each'.

Quantity is a read-only only field displaying the current quantity in the selected *Package*.

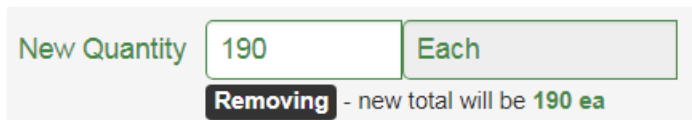
3

**Adj. Quantity**

 A form field labeled "Adj. Quantity" with a text input containing "-5" and a dropdown menu showing "Each".

Use this field to increase or decrease the quantity in the selected *Package*. Use a negative number as shown in the example to decrease the quantity and a positive number to increase the quantity.

The user can choose to enter an *Adj. Quantity* or a *New Quantity*. When a value is entered in the *Adj. Quantity* field, the amount in the *New Quantity* field is automatically calculated when the user clicks out of the *Adj. Quantity* field.

4

**New Quantity**

 A form field labeled "New Quantity" with a text input containing "190" and a dropdown menu showing "Each". Below the field is a feedback message: "Removing - new total will be 190 ea".

Use this field to specify the *New Quantity* in the selected *Package*.

The user can choose to enter a *New Quantity* or an *Adj. Quantity*. When a value is entered in the *New Quantity* field, the amount in the *Adj. Quantity* field is automatically calculated when the user clicks out of the *New Quantity* field.

5

**Reason Drop-Down**

 A dropdown menu labeled "Reason" with the text "- Select -" and a downward arrow.

Use the *Reason* drop-down to indicate why the *Package* is being adjusted. See Section 6.5.1 below for the list of *Adjustment Reasons* defined by the State of California.

6

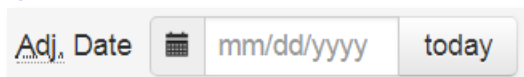
**Optional Note/Required Note**

 A text input field labeled "Optional Note".

Use the *Optional Note* or *Required Note* field to provide further explanation of the circumstances that lead to the need to adjust the package. The field will be optional or required depending on the selected reason.



7

**Adj. Date**


Enter the date the package is being adjusted (or use the today button to enter the current date).

8

**Add Button**

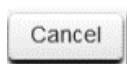

Select this button to record additional package adjustments simultaneously.

9

**Adjust Packages Button**


Select this button to process the package adjustment in Metrc.

10

**Cancel Button**


Select this button to disregard the entries made on the *Adjust Packages* page and return to the *Packages* page.

## 6.5.1 Adjustment Reasons

The reason for the adjustment must be identified using the *Adjustment Reasons* defined by the State of California as listed in Exhibit 54 below. Use of some *Adjustment Reasons* may be limited to certain license types, as determined by the State.

Adjustment Reason	Reason Usage
Damage (BCC)	<i>Damage of cannabis goods. Notes section should be used to explain the damage. Displays for BCC licensees only.</i>
Display Sample	<i>Cannabis goods used for display purposes in a licensed designated retail area.</i>

Adjustment Reason	Reason Usage
Enforcement Testing	<i>Under order of state and/or local jurisdiction, samples removed from a licensee's inventory for enforcement related analysis.</i>
Failure to Thrive (BCC)	<i>Cannabis plant failure to grow or develop vigorously. Displays for BCC licensees only.</i>
Free Medicinal Cannabis Goods	<i>Cannabis goods that are provided to a medicinal cannabis patient or primary caregiver without compensation.</i>
Incorrect Quantity	<i>Package received via transfer that was not correctly weighed or counted. This should <b>NOT</b> be used to correct sales. If the package quantity varies significantly, it should be rejected. Notes section should be used to explain the error.</i>
Male Plants (BCC)	<i>The plant(s) in the package is male. Displays for BCC licensees only.</i>
Mandated Destruction	<i>Cannabis plant(s) or package(s) destroyed as a result of a State– or local authority–mandated or –supervised process.</i>
Onsite Testing	<i>To indicate testing on a licensed premise for the purposes of quality assurance of the product in conjunction with reasonable business operations.</i>  <i>Note: Not to be used for official state testing</i>
Over Pulled	<i>Too much product was placed in a new Metrc package, resulting in less product remaining in the originating package than is reflected in Metrc. This requires a note indicating the corresponding package that was under pulled. Notes section should be used to explain the error.</i>
Oversold	<i>Over reported sales from the package. Notes section should be used to explain the error.</i>
Public Safety/Recall	<i>To address potential or imminent threats to the environment or public safety, which may pose a health and safety risk to consumers. Cannabis goods removed from sale, distribution, and consumption. Notes section should be used to explain the public safety or recall details.</i>

Adjustment Reason	Reason Usage
QA Test Sample	<p><i>Sample provided to a licensed testing laboratory for the purposes of quality assurance (QA) testing of a product.</i></p> <p><i>Note: Not to be used for official state testing</i></p>
Regulatory Test Sample	<i>The amount of the representative sample obtained by a licensed testing laboratory for regulatory compliance testing.</i>
Research & Development	<i>Adjustment used to indicate product was used for Research and Development</i>
Sample Tested	<i>The portion of the representative sample used for regulatory compliance testing. The remainder of the representative sample must be retained for 45 business days on the licensed testing laboratory premises. **FOR LAB USE ONLY</i>
Scale Variance	<i>When there is a measurable difference in the weight of the product due to a scale.</i>
Spoilage	<i>Deterioration of packaged product.</i>
State-Authorized Adjustment	<i>State approval must be received in order to use this adjustment reason. The Metrc Support ticket number must be included in the Notes section.</i>
Theft	<i>Discrepancy in cannabis product inventory due to theft; Licensing Authority must be notified. Notes section should be used to detail theft.</i>
Under Pulled	<i>Too little product was placed in a new Metrc package, resulting in more product remaining in the originating package than is reflected in Metrc. This requires a note indicating the corresponding package that was over pulled. Notes section should be used to explain the error.</i>
Undersold	<i>Underreported sales from the package. Notes section should be used to explain the error.</i>
Voluntary Surrender	<i>In coordination with state and/or local jurisdiction, indicates that the cannabis goods were voluntarily surrendered and no longer in the licensee's possession.</i>
Waste (Unusable Product)	<i>Cannabis or cannabis product rendered into cannabis waste (unrecognizable &amp; unusable) and disposed of per licensing authority regulations.</i>
Weight Change Due to Moisture	<i>Packaged cannabis product's weight has increased or decreased due to moisture content change.</i>

Exhibit 54: State of California Adjustment Reasons

## 7 Transfers

Metrc functionality to facilitate the transfer process is accessed from the *Transfers* menu in the top navigation bar.

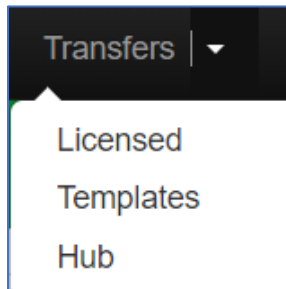


Exhibit 55: The Transfer Menu

Information related to the transfer process includes the following:

1. A transfer must be created anytime a package moves from one licensee to another, even if the two facilities are located on the same property.
2. To print a manifest, select the manifest number to highlight it in orange, then select the *View Manifest* button and select *Print*.
3. Packages can only be transported from one licensee to another by a licensed Distributor. A Testing Laboratory is allowed to transport test samples for official state testing. Distributors and Testing Laboratories are required to record the actual departure time from the origin facility and the actual arrival time at the destination facility in Metrc real-time.
4. A package must be received in its entirety (the system DOES NOT allow receiving a partial package).
5. A transfer can be rejected by individual package, or in whole by rejecting all packages.
6. A rejected package requires the originating Licensee to receive the package back into inventory.
7. A package must exist in order to be selected for transfer. Transfers are done in real time and are inventory dependent.
8. When receiving a package, any adjustments to the weight, volume, or count may be reported to the State.
9. If there are any questions about a transfer, reject it.

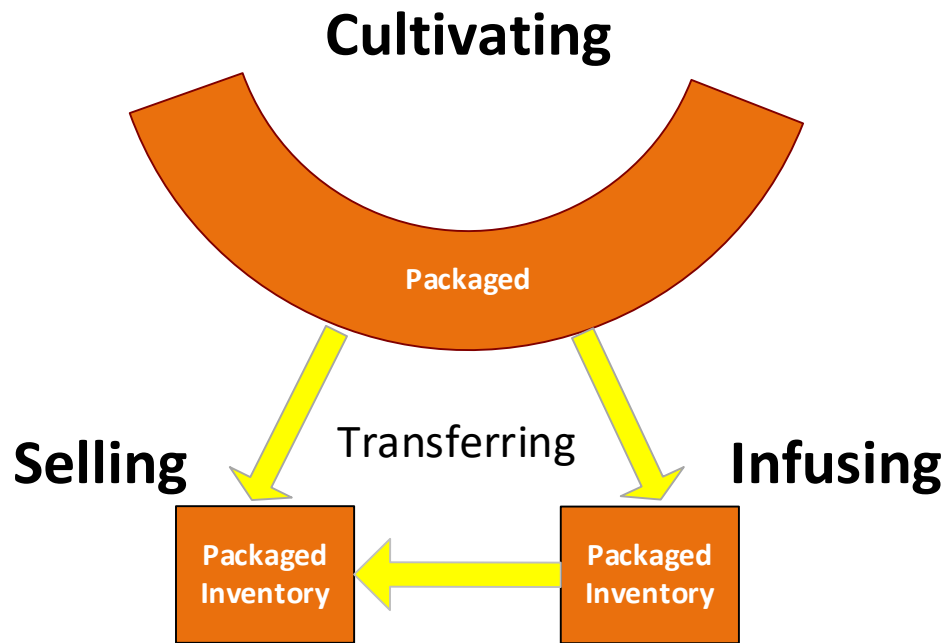


Exhibit 56: The Transfer Process

## 7.1 Licensed Transfers

A *Licensed Transfer* is a Metrc term for the transfer of cannabis or cannabis products between Annual Licensees.

### 7.1.1 Creating a Licensed Transfer

All information entered into the manifest fields on the *New Licensed Transfer* page shown in Exhibit 57 is required and can be saved and printed in PDF format. Save a copy of the manifest for your records. Print a copy for the driver. Read all rules and regulations regarding transferring and transfer manifests provided by the State of California to ensure that the transfer is in compliance.

The *New Licensed Transfers* page is accessed by selecting the *Licensed* option from the *Transfers* menu in the top navigation bar.

The screenshot displays the 'New Licensed Transfer' form with the following fields and buttons identified by numbered callouts:

- 1** Destination Look-up: Destination 1 (C9-0000005-LIC)
- 2** Transfer Type Drop-Down: Type (Wholesale Manifest)
- 3** Planned Route: Planned Route (Take I-5 south to Main Street exit.)
- 4** Transfer Schedule: Est. Departure (03/17/2020, 07:00 AM) and Est. Arrival (03/18/2020, 02:00 AM)
- 5** Transport Look-up: Transport #1 (C11-0000009-LIC)
- 6** Phone No.: Phone No. (555-129-4874)
- 7** Layover Checkbox: Layover (checked)
- 8** Layover Schedule: Est. Check-In (03/17/2020, 05:00 AM) and Est. Check-Out (03/18/2020, 06:00 AM)
- 9** - Lookup - (clear)
- 10** Driver Information: Employee ID (Tom Thomas), Driver's Name (Tom Thomas), Driver's Lic. No. (C4567890123)
- 11** Vehicle Look-up Drop-Down: - Lookup - (clear)
- 12** Vehicle Information: Vehicle Make (Dodge), Vehicle Model (Ram), License Plate (Distro1)
- 13** Package Look-up: Package #1 (1A4FF0300000E1A000000163)
- 14** Wholesale Price: Wholesale Price (\$ 1999.99)
- 15** Add/Subtract Package Button: (+) (package)
- 16** Register Transfer Button: Register Transfer
- 17** Cancel Button: Cancel

Exhibit 57: Creating a New Licensed Transfer

1

**Destination Look-up**

Destination 1

Use this field to select the location to transfer to. Use the magnifying glass to find the location in the list of all actively licensed businesses, which is sorted in numerical order by license number.

2

**Transfer Type Drop-down**

Type

Use this drop-down to select the kind of transfer to perform. The *Transfer Types* defined by the State of California and their usage are outlined in Exhibit 58 below. Use of some *Transfer Types* may be limited to certain license types, as determined by the State.

Transfer Type	Transfer Type Usage
Transfer	<i>Used for all transfers except transfers requiring the use of a Wholesale Manifest or Return manifest.</i>
Return	<i>A Return transfer is used only for the transfer of defective manufactured products back to the originating licensee.</i>
Wholesale Manifest	<p><i>A Wholesale Manifest transfer is used when transferring products to a Retailer licensee.</i></p> <p><i>When a Wholesale Manifest is used, the originator is required to record the wholesale price of each package in the transfer.</i></p> <p><i>A Microbusiness functioning as a Distributor with a transfer that includes a Retailer licensee, or another Microbusiness licensee functioning as a Retailer, shall follow the process above.</i></p> <p><i>It is recommended that Nurseries utilize a Wholesale Manifest when transferring seeds or immature plants to a Retailer.</i></p>

**Exhibit 58: State of California Licensed Transfer Types**

3

**Planned Route**

Use this field to specify the route to be taken from the originating license to the destination license.

4

**Transfer Schedule**

The form displays two sections for scheduling. The top section, 'Est. Departure', includes a calendar icon, a date field set to '12/15/2017', and a 'today' button. Below this is a time selection interface with up and down arrows, a field showing '03', a colon separator, a field showing '55', and a 'PM' button. The bottom section, 'Est. Arrival', follows the same layout with a date field set to '12/15/2017', a 'today' button, and a time selection interface showing '05' and '55' PM.

Use the schedule to enter the estimated date/time for the departure, and expected date/time for the arrival of the shipment. Data can be manually entered or selected using the calendar date/time functions.

5

**Transport Look-up**

The form consists of a single input field labeled 'Transport # 1' containing the text 'C13-0000010-LIC'. To the right of the input field is a magnifying glass icon used for searching.

Use this field to select the Distributor or Laboratory licensee that will transport the package(s). Use the magnifying glass to display a list of all actively licensed Distributors and Laboratory licensees. The list is initially sorted alphabetically by license name and then by license number, but it can be sorted and filtered as needed.

6

**Phone No.**

The form has a text field labeled 'Phone No.' containing the number '209-454-9200'. To the right of the text field is a blue hyperlink labeled '(use default)'.

Use this field to specify the phone number to display in the *Contact Phone No. for Inquiries* field on the manifest. Selecting the *use default* hyperlink populates the field with the main phone number of the originating facility.

7

**Layover Checkbox**



The form contains a single checkbox labeled 'Layover'. The checkbox is checked, indicated by a small square with a checkmark inside.

Mark this checkbox if there will be a stop between the origin and destination facility. This will display the *Layover Schedule* fields.



8

### Layover Schedule

Est. Check-In		12/15/2017	today	Est. Check-Out		12/15/2017	today
		<div> <div>04</div> <div>:</div> <div>55</div> <div>PM</div> </div>				<div> <div>05</div> <div>:</div> <div>10</div> <div>PM</div> </div>	

Use the schedule to enter the estimated check-in date/time at the layover location, and the estimated check-out date/time at the layover location. Data can be manually entered or selected using the calendar/time functions.

9

### Driver Look-up Drop-down

Joe Smith (Joe.Smith@CannabisTransport.com) ▼

This drop-down displays a list of drivers previously entered into the *Driver Information* field. This includes *Employee ID*, *Driver's Name*, and *Driver's Lic. No.* Driver information is not associated with vehicles.

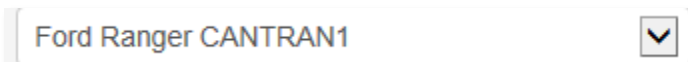
10

### Driver Information

Employee ID	Joe.Smith@CannabisTransport.c
Driver's Name	Joe Smith
Driver's Lic. No.	C013349792

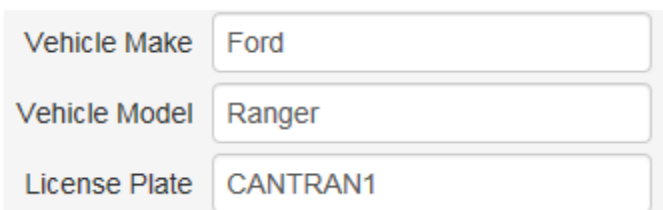
Add each new driver's information, providing complete information for future use. The *Employee ID* is a required field that can be used at the licensee's discretion to record an employee internal business ID number or other distinguishing employee identifier.

11

**Vehicle Look-up Drop-down**


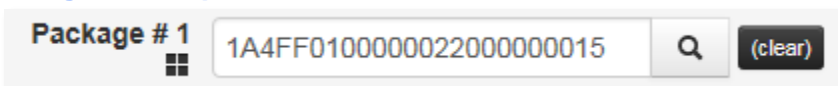
This drop-down displays a list of vehicles previously entered into the *Vehicle Information* field. This includes *Vehicle Make*, *Vehicle Model*, and *License Plate*. Vehicle information is not associated with the driver.

12

**Vehicle Information**


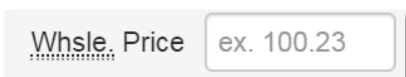
Add each new vehicle's information, providing complete information for future use. This includes *Vehicle Make*, *Vehicle Model*, and *License Plate*.

13

**Package Look-up**


Use this field to select packages in inventory to include in a transfer that have not previously been included in the transfer. Use the magnifying glass to display a list of all packages in inventory.

14

**Wholesale Price**


When a *Transfer Type* of *Wholesale Manifest* is used to transfer packages to a Retailer, a *Wholesale Price* field displays. *Wholesale Price* is a required field.

15

**Add/Subtract Package Button**

Press the black *Add* (plus) button to add additional packages to a manifest as required. Only add packages for each destination on a manifest. For multiple destinations, add packages to each individual destination (do not add all packages to a single destination).

Press the black *Subtract* (minus) button to remove the corresponding packages from the transfer manifest. This button only displays when a subsequent package has been added.

The total number of packages in a transfer is limited to 250.

16

**Register Transfer Button**

Select this button to finalize the manifest creation process and make it available to all parties named in the transfer.

After a transfer has been created/registered, it is viewable by the licensee that created it as Outgoing, by the licensee receiving it as Incoming, and by the State. Transfers can be scheduled in advance for as many facilities as desired, and for as many packages as needed, as long as the transfer meets regulations.

17

**Cancel Button**

Select this button to prevent the transfer/manifest from being created.

**Remember:**

- A transfer cannot be generated for a package that has not been created. Only active packages can be added to a transfer manifest and shipped.
- Metrc is a reporting system. All transfers should be completed based on all applicable State of California rules and regulations. Metrc does not replace, alter, or change any rules or regulations. Consult your Licensing Authority for further information on how to manifest products.

## 7.1.2 Licensed Transfer – Outgoing Tab

The *Originating* facility can view outbound transfers on the *Outgoing* tab of the *Licensed Transfers* page shown in Exhibit 59.

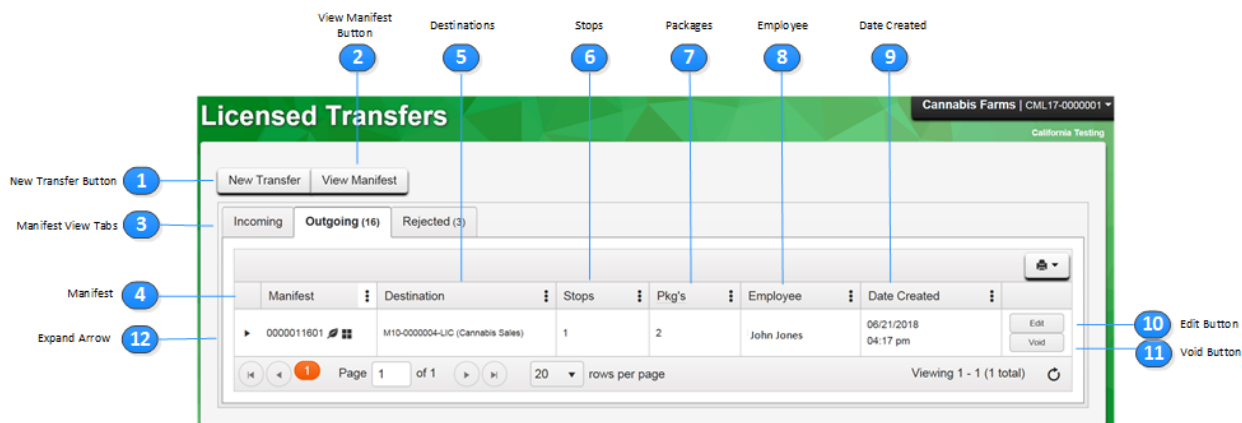


Exhibit 59: The Licensed Transfers Page – Outgoing tab

1

### New Transfer Button

New Transfer

This button launches the *New Licensed Transfer* page so a transfer manifest form can be created.

2

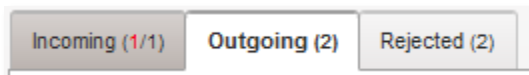
### View Manifest Button

View Manifest

Select this button to look at any existing manifest. First highlight the manifest for viewing. The new manifest is created in PDF format so this will take a few moments. The manifest can then be printed.

3

### Manifest View Tabs



Only manifests for the location the user is in may be viewed. Three available options include: *Incoming*, *Outgoing* and *Rejected*

The *Incoming* and *Outgoing* tabs include counts of overdue transfers (in red) / total outstanding transfers (in black). The *Rejected* tab includes only a count of return transfers not yet received in Metrc. The counts are not updated in real-time; they are re-calculated every couple of hours.

4

### Manifest



This field displays the unique manifest number. To the right of the unique manifest number are package detail icons. These icons provide an at-a-glance view of the packages in the transfer. See Section 3.3 Common Elements for more information on package icons. The user can hover over each icon to determine its meaning.

5

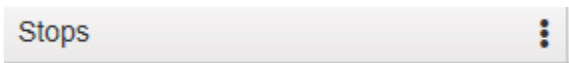
### Destination



This field displays the *Destination* of the transfer.

6

### Stops



This field displays the number of stops (destinations) specified on the manifest. In California, only a single destination is included on a manifest.

7

### Packages



This field displays the number of packages being moved in that transfer, along with the other corresponding information.

8

**Employee**

Employee

This field displays the employee at the facility that created the manifest.

9

**Dated Created**

Date Created

This field displays the date the manifest was created.

10

**Edit Button**

Edit

Selecting this button allows the originating facility to edit the manifest details until the Transporter acknowledges the items on the shipping manifest have been verified and received and/or leaves the facility.

11

**Void Button**

Void

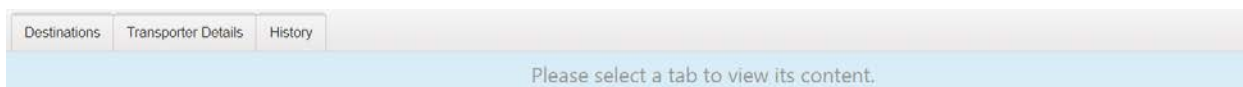
Selecting this button to allows the originating facility to void the manifest details until the Transporter acknowledges the items on the shipping manifest have been verified and received and/or leaves the facility.

12

**Expand Arrow**

This arrow indicates that there is additional detail available for the row.

Selecting the expand arrow next to the *Manifest* number provides information about the *Destination*, *Transporter*, and *History*.



**Exhibit 60: Manifest Details**

The *Transporter Details* tab is not currently used in California. Selecting the *History* tab displays a log of every event related to the transfer.


Selecting the expand arrow to next to the *Destination* on the *Destinations* tab provides information about the *Transporter* and *Package(s)* specific to the *Destination*.

Transporter		:	Direction		:	EOI		:	ACI		:	ECO		:	ACO		:							
C13-0000010 LIC Lily's Green Transport			Outbound																					
1 Page 1 of 1 20 rows per page Viewing 1 - 1 (1 total)																								
Package	:	Stc. Hs	:	Stc. Pkg's	:	Item	:	Category	:	Item Strain	:	Lab Testing	:	Shipped Qty	:	Gross Wgt	:	Ship Whole Price	:	Received Qty	:	Rcv Whole Price	:	Status
1A4FF0300000BB9000000010		PEP 03.18.19		(multi- package)		PB Patty Flower		Flower		Peanut Butter Patty		NotSubmitted		5 oz				N/A				N/A		

**Exhibit 61: Destination Transporter and Package Information**

Selecting the expand arrow next to each *Package* displays tabs containing *Lab Results* (if applicable) and the *History* of the package. See Section 6.2 for more information about the content of these tabs.

**Remember:**

- Each field with the  symbol can be filtered and sorted (see search functions for more details).
- Use the *Expand Arrow* to review all information about that manifest.

### 7.1.3 Viewing a Manifest

When the *Register Transfer* button is selected on the *New Licensed Transfer* page, a pop-up message is displayed confirming the registration and providing a link to view the manifest. Clicking inside the pop-up opens the PDF version of the manifest in a new browser tab. Exhibit 62 below shows an example of the pop-up displayed when using a Chrome browser. The type of browser being used and the browser notification settings may impact the behavior of this pop-up.

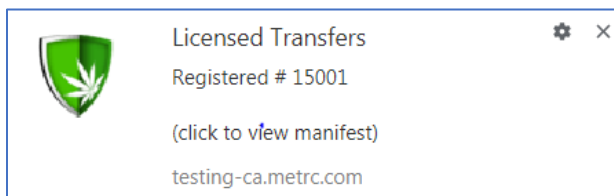


Exhibit 62: The Transfer Confirmation Message

A manifest can also be viewed by selecting the *View Manifest* button. The *View Manifest* button is available in the *Incoming*, *Outgoing* and *Rejected* pages. Select the manifest before selecting the *View Manifest* button.

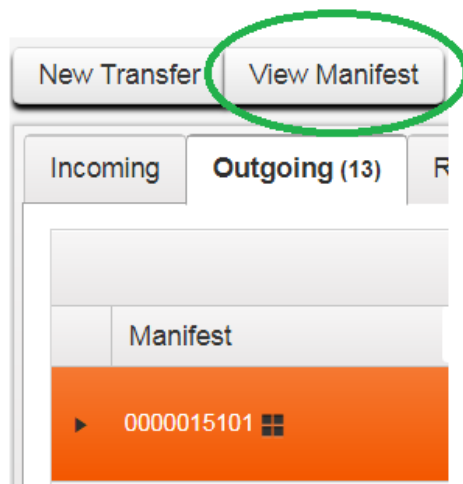


Exhibit 63: The View Manifest Button

Once the appropriate manifest has been highlighted and the *View Manifest* button has been selected, a new browser tab launches and the manifest opens as a PDF file.

**NOTE: Viewing the manifest requires adjusting the computer settings to allow popups from Metrc.**

The manifest can be printed or saved from *View Manifest* using the browser's Print and Save buttons.

NOTE: Be sure to print the manifest for the driver before he/she leaves the facility.



## 7.1.4 Modifying a Transfer

A transfer can be modified as shown in Exhibit 64, or voided, up until the time that the Distributor or Testing Laboratory marks that it has departed the facility. Once the transfer process has begun, the transfer may not be modified except by the Distributor or Testing Laboratory to edit estimated departure and arrival times, or driver and vehicle information (see *Edit Transporter Info* below).

When modifying transfers, each of the transfer fields may be modified at the same level of detail as when the transfer was created. Edits may be completed for a variety of reasons including: error correction, changes in destination, changes in product, etc. The transfer process is a key component of the chain of custody process, and modifying a transfer manifest should be handled appropriately.

To modify a transfer, navigate to the *Outgoing* tab on the *Licensed Transfers* page (see Section 7.1.2). Locate the proper transfer and select the *Edit* button.

The screenshot shows the 'Edit Licensed Transfer' form with the following numbered callouts:

- 18: Manifest (0000055101)
- 1: Destination Look-up (Destination 1: C9-0000004-LIC)
- 3: Planned Route (Highway 99 to Oak Street exit)
- 2: Transfer Type Drop-Down (Wholesale Manifest)
- 4: Transfer Schedule (Est. Departure: 03/17/2020 02:00 AM, Est. Arrival: 03/18/2020 12:00 AM)
- 5: Transport Look-up (Transport #1: C11-0000002-LIC)
- 6: Phone No. (530-839-5700)
- 7: Layover Checkbox (checked)
- 8: Layover Schedule (Est. Check-In: 03/17/2020 07:00 PM, Est. Check-Out: 03/18/2020 06:00 AM)
- 9: Driver Look-up Drop-Down (- Lookup -)
- 10: Driver Information (Employee ID: Joe Smith@Cannabis Connect cr, Driver's Name: Joe Smith, Driver's Lic. No.: C387198721)
- 11: Vehicle Look-up Drop-Down (- Lookup -)
- 12: Vehicle Information (Vehicle Make: Chevy, Vehicle Model: F10, License Plate: CANCON2)
- 13: Package Look-up (Package #1: 1A4FF0300000026000000377)
- 14: Wholesale Price (\$ 299.99)
- 15: Add/Subtract Package Button (+package)
- 19: Save Transfer Button
- 17: Cancel Button

Exhibit 64: The Edit Licensed Transfer Page

The *Edit Licensed Transfer* page shown in Exhibit 64 shares many elements with the *New Licensed Transfer* page (blue annotations). Please see the Section 7.1.1 above for a description of these shared elements. The elements unique to the *New Licensed Transfer Template* page (red annotations) are described below.

18

**Manifest**

Manifest 0000000518

This field displays the unique manifest number.

19

**Save Transfer Button**

Save Transfer

Select this button to save the updates to the manifest and make the updated manifest available to all parties named in the transfer.

**Remember:**

New packages can be added or packages may be removed. However, packages cannot be adjusted from the *Transfer* page. If a package must be adjusted, remove it from the transfer to make the adjustment. After the package has been adjusted, it can be added back into the transfer.

### 7.1.5 Voiding a Transfer

Voiding a transfer can only be completed by the originating business. Voiding a transfer permanently eliminates it and moves the product back into the originator's inventory. To void a transfer, navigate to the *Outgoing* tab on the *Licensed Transfers* page (see Section 7.1.2). Locate the proper transfer and select the *Void* button.

After the *Void* button is selected, a prompt displays asking to confirm the void, as shown in Exhibit 65. Press *OK* to confirm the void.

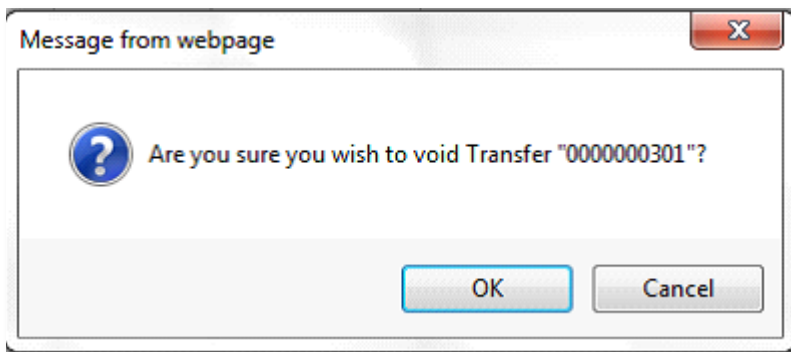


Exhibit 65: Void Transfer Confirmation Message

Once a transfer has been voided, it cannot be reinstated and all associated packages will be returned to the transfer originator's inventory.

## 7.1.6 Licensed Transfer – Incoming Tab

The *Destination* facility can view incoming transfers on the *Incoming* tab of the *Licensed Transfers* page shown in Exhibit 66.

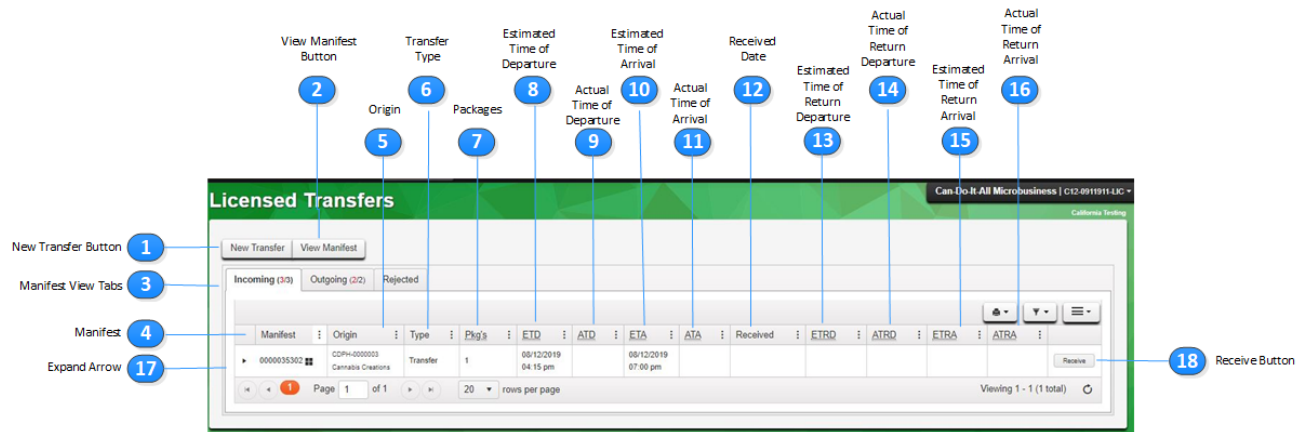


Exhibit 66: The Licensed Transfers Page - Incoming Tab

1

### New Transfers Button

New Transfer

Select this button to launch the *New Transfer* page so a transfer manifest form can be created.

2

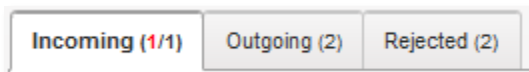
### View Manifest Button

View Manifest

Select this button to look at any existing manifest. First highlight the manifest for viewing. The new manifest is created in PDF format so this will take a few moments. The manifest can then be printed.

3

### Manifest View Tabs



Only manifests for the location the user is in may be viewed. The available tabs include: *Incoming*, *Outgoing* and *Rejected*.

The *Incoming* and *Outgoing* tabs include counts of overdue transfers (in red) / total outstanding transfers (in black). The *Rejected* tab includes only a count of return transfers not yet received in Metrc.

4

### Manifest



This field displays the unique manifest number. To the right of the unique manifest number are package detail icons. These icons provide an at-a-glance view of the packages in the transfer. See Section 3.3 Common Elements for more information on package icons. The user can hover over each icon to determine its meaning.

5

### Origin



This field displays the location where the transfer was created, along with the other corresponding information.

6

### Transfer Type



This field displays the kind of transfer being performed. *Transfer Types* include: *Transfer*, *Return*, and *Wholesale Manifest*. See Exhibit 58 above for a description of each *Type*.

7

### Packages



This field displays the number of packages being moved in a transfer, along with other corresponding information.

8

**ETD (Estimated Time of Departure)**A rectangular input field with the text "ETD" and a three-dot menu icon on the right.

This field displays the time the transfer will leave the point of origin entered into the transfer manifest for that transfer.

9

**ATD (Actual Time of Departure)**A rectangular input field with the text "ATD" and a three-dot menu icon on the right.

This field displays the date/time the transfer left the point of origin, populated with the date/time the Transporter selected the *Depart* button for the manifest.

10

**ETA (Estimated Time of Arrival)**A rectangular input field with the text "ETA" and a three-dot menu icon on the right.

This field displays the time the transfer should arrive at the destination entered in the transfer manifest for that particular transfer.

11

**ATA (Actual Time of Arrival)**A rectangular input field with the text "ATA" and a three-dot menu icon on the right.

This field displays the date/time the transfer arrived at the destination facility, populated with the date/time the Transporter selected the *Arrive* button for the manifest.

12

**Received Date**A rectangular input field with the text "Received" and a three-dot menu icon on the right.

This button displays the time the recipient of the transfer selected the *Receive* button. This may or may not correspond to the drop off time. It is important for the receiving licensee to select the *Receive* button as soon as the product is received and verified in order to avoid discrepancies.

13

**ETRD (Estimated Time of Return Departure)**A rectangular button with a light gray background. It contains the text "ETRD" in a bold, sans-serif font, followed by a vertical ellipsis (three dots) on the right side.

This field displays the time the transfer will leave the destination facility to return rejected products, if any, to the origin facility.

14

**ATRD (Actual Time of Return Departure)**A rectangular button with a light gray background. It contains the text "ATRD" in a bold, sans-serif font, followed by a vertical ellipsis (three dots) on the right side.

This field displays the date/time the transfer left the destination facility, populated with the date/time the Transporter selected the *Depart* button for the return trip.

15

**ETRA (Estimated Time of Return Arrival)**A rectangular button with a light gray background. It contains the text "ETRA" in a bold, sans-serif font, followed by a vertical ellipsis (three dots) on the right side.

This field displays the time the return transfer should arrive at the origin facility with the returned product.

16

**ATRA (Actual Time of Return Arrival)**A rectangular button with a light gray background. It contains the text "ATRA" in a bold, sans-serif font, followed by a vertical ellipsis (three dots) on the right side.

This field displays the date/time the transfer arrived at the origin facility, populated with the date/time the Transporter selected the *Arrive* button for the return trip.

17

**Expand Arrow**

This arrow indicates that there is additional detail available for the row.

Selecting the expand arrow to next to the *Manifest* number provides information about the *Transporter(s)* and *Package(s)* included in the transfer.

Transporter

C11-000000-LIC  
Lily's Green Distributing

Direction

Outbound

ECI

ACI

ECO

ACQ

Page 1 of 1

20 rows per page

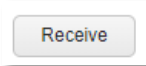
Viewing 1 - 1 (1 total)

Package	Src HS	Src Pkg's	Item	Category	Item Strain	Lab Testing	Shipped Qty.	Gross Wgt.	Ship Whole Price	Received Qty.	Rcv Whole Price	Status
1A4FF0300000B00000000028		1A4FF0300000B00000000014	Simoes Flower	Flower	Simoes	NotSubmitted	8 g		N/A		N/A	Shipped

**Exhibit 67: Manifest Transporter and Package Information**

Selecting the expand arrow to next to each *Package* displays tabs containing *Lab Results* (if applicable) and the *History* of the package. See Section 6.2 for more information about the content of these tabs.

18

**Receive Button**

This button launches the *Receive Licensed Transfer* page, which allows the Destination facility to adjust the quantity received, reject the entire transfer, reject specified packages in the transfer, or accept the transfer as is. See Section 7.1.7 below for more details.



## 7.1.7 Receiving a Transfer

Receiving a transfer is the final point of exchange in the chain of custody.

The screenshot displays the 'Licensed Transfers' interface. At the top, there are tabs for 'New Transfer' and 'View Manifest'. Below these, there are filters for 'Incoming', 'Outgoing (2)', and 'Rejected'. The main table shows a transfer manifest with the following details:

Manifest	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received
0000024101	A11-0000024UC Cannabis Connection	Wholesale Manifest	1	01/17/2019 06:30 am		01/18/2019 12:00 pm		

Below the manifest table, there is a section for 'Transporter' and 'ECI' with a 'Check-In' and 'Check-Out' section. The transporter is 'M13-0000010-UC Cannabis Transport' and the ECI is '01/17/2019 05:00 pm'. The check-out is '01/18/2019 06:00 am'. There is a 'Receive' button on the right side of the manifest table.

At the bottom, there is a table for 'Package' with columns: Package, Harvest, Item, Category, Lab Testing, Shipped Qty, Gross Wgt, Ship Whole Price, Received Qty, Rcv Whole Price, and Status. The package is '1A4FF03000000260000000179', the item is 'Burnt Brownies', the category is 'Edible (weight - each)', the lab testing is 'NotSubmitted', the shipped qty is '105 ea', the gross weight is '\$872.96', the received qty is 'N/A', and the status is 'Shipped'.

**Exhibit 68: Receiving a Transfer**

To display the contents of the shipment for review prior to accepting the packages, use the *Drop-Down Menu Arrow* to the left of the transfer *Manifest ID* number as shown in Exhibit 68.

The *Receive* button is on the right side of the transfer manifest, as shown in Exhibit 68. Pressing the *Receive* button does not accept the transfer but rather launches the *Receive Licensed Transfer* page as shown in Exhibit 86 below, which allows the Destination facility to adjust the quantity received, reject the entire transfer, reject specified packages in the transfer, or accept the transfer as is.

**Receive Licensed Transfer**

<b>Manifest</b>	0000024101	<b>Transfer Type</b>	Wholesale Manifest
<b>Origin Lic. No.</b>	A11-0000002-LIC	<b>Origin Name</b>	Cannabis Connection
<b>Main Phone No.</b>	530-839-5700	<b>Mobile Phone No.</b>	530-839-5797
<b>Transporter Lic. No.</b>	M13-0000010-LIC	<b>Transporter Name</b>	Cannabis Transport
<b>Employee ID</b>	Joe.Smith@CannabisTransport.c	<b>Vehicle Make</b>	Toyota
<b>Driver's Name</b>	Joe Smith	<b>Vehicle Model</b>	X100
<b>Driver's Lic. No.</b>	C387198711	<b>License Plate</b>	CanTran2
<b>Phone No. for Questions</b>	530-839-5700		

**Package # 1** 1A4FF0300000026000000179 **Item** Burnt Brownies **Shipped Qty.** 105 **ea** ☐ **Reject**

**Receive Qty.** 105 **Each** **Whsle. Price** 872.96

**Receive Transfer Button** **Cancel Button**

**1** Shipped/Received Quantity  
**2** Wholesale Price  
**3** Reject Package Checkbox  
**4** Receive Transfer Button  
**5** Cancel Button

Exhibit 69: The Receive Licensed Transfer Page

1

**Shipped/Received Quantity**

**Shipped Qty.** 25 **ea** ☐ **Reject**

**Receive Qty.** 25 **Each**

The *Shipped Quantity (Qty.)* field displays the amount of product that was recorded when the package was created. The same product quantity is auto-populated in the *Receive Quantity* field. Two choices are available if the *Shipped Quantity* does not match the *Received Quantity*:

- Adjust the package in the *Received Quantity* field to correct the variance, or
- Reject the package

2

**Wholesale Price**

**Whsle. Price** 872.96

Retailers and Microbusinesses performing licensed Retailer activities: The *Wholesale (Whsle) Price* field displays the wholesale price of the product that was recorded when the transfer was created. If accepting a product in the transfer and the wholesale price is incorrect, enter the correct price in the *Wholesale Price* field.

If the package is accepted, any adjustments entered in the *Received Quantity* and *Wholesale Price* fields display in the *Manifest* details as shown in Exhibit 70 below.

Manifest	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received
0000024101	A11-000003-LIC Cannabis Connection	Wholesale Manifest	1	01/17/2019 06:30 am		01/18/2019 12:00 pm		01/17/2019 01:04 pm

Transporter

M13-0000019-LIC  
Cannabis Transport

ECI

01/17/2019  
05:00 pm

Check-In

ECQ

01/18/2019  
06:00 am

Check-Out

Page 1

of 1

20 rows per page

Viewing 1 - 1 (1 total)

Package	Harvest	Item	Category	Lab Testing	Shipped Qty	Gross Wgt	Ship Whsle. Price	Received Qty	Rcv Whsle. Price	Status
1A4FF0300000026000000179		Burnt Brownies	Edible (weight - each)	NotSubmitted	105 ea		\$872.96	104 ea	\$827.96	Accepted

Page 1

of 1

20 rows per page

Viewing 1 - 1 (1 total)

Exhibit 70: Received Quantity and Wholesale Price Adjustments in Transfer Details

3

## Reject Package Checkbox

Shipped Qty.

105

ea

☒ Reject

Reject Reason

- Select -

Optional Note

Select this checkbox to allow a single package to be rejected from a transfer without rejecting the entire transfer. To reject a package, select the *Reject* checkbox next to the corresponding package and select a reason from the *Reject Reason* drop-down. A *Note* field displays and will be required or optional depending on the rejection reason. Reasons to reject a package are shown in Exhibit 71. These vary according to license type.

Rejection Reason	Reason Usage
Damage	<i>There has been damage to the plant or package.</i>
Damage (BCC)	<i>There has been damage to the package. Notes section should be used to explain the damage. Displays for BCC licensees only.</i>
Data Entry Error	<i>A package(s) cannot be accepted by the receiving licensee due to a data entry error that occurred when the manifest was created.</i>
Incorrect Item (Transfer)	<i>A manifest was created with the incorrect item and must be rejected.</i>
Incorrect Quantity	<i>Package received via transfer that was not correctly weighed or counted. This should <u>NOT</u> be used to correct sales. If the package quantity varies significantly, it should be rejected. Notes section should be used to explain the error.</i>
Non-Compliant Label	<i>Package received via transfer that contains non-compliant label.</i>

Spoilage	<i>Deterioration of packaged product.</i>
Theft	<i>Rejection of a package when product has been stolen in transit. Licensing Authority must be notified. Notes section should be used to detail theft.</i>

**Exhibit 71: State of California Package Rejection Reasons**

When a package is rejected, the received quantity and unit of measure disappear. Any package not checked will be received. At that point, the user can accept the transfer and the rejected package(s) will remain in the custody of the sender. To reject the entire transfer, check the *Reject* checkbox for all packages in the transfer.

4

#### Receive Transfer Button

Receive Transfer

Select this button to accept the transfer and move the packages into the recipient's inventory unless the package(s) have been rejected. Press the *Receive Transfer* button to record the package rejection(s), as well as accepted packages. Rejected packages are returned to the inventory of the facility initiating the transfer. Accepted transfers are added to the inventory of the Destination facility.

5

#### Cancel Button

Cancel

Select this button to prevent the transfer/manifest from being received. The *Licensed Transfer* page will display.

### 7.1.8 Receiving a Rejected Transfer - Rejected Tab

Transfers rejected by the Destination facility appear on the *Rejected* tab, shown in Exhibit 72, of the *Licensed Transfer* page of the Originating facility.

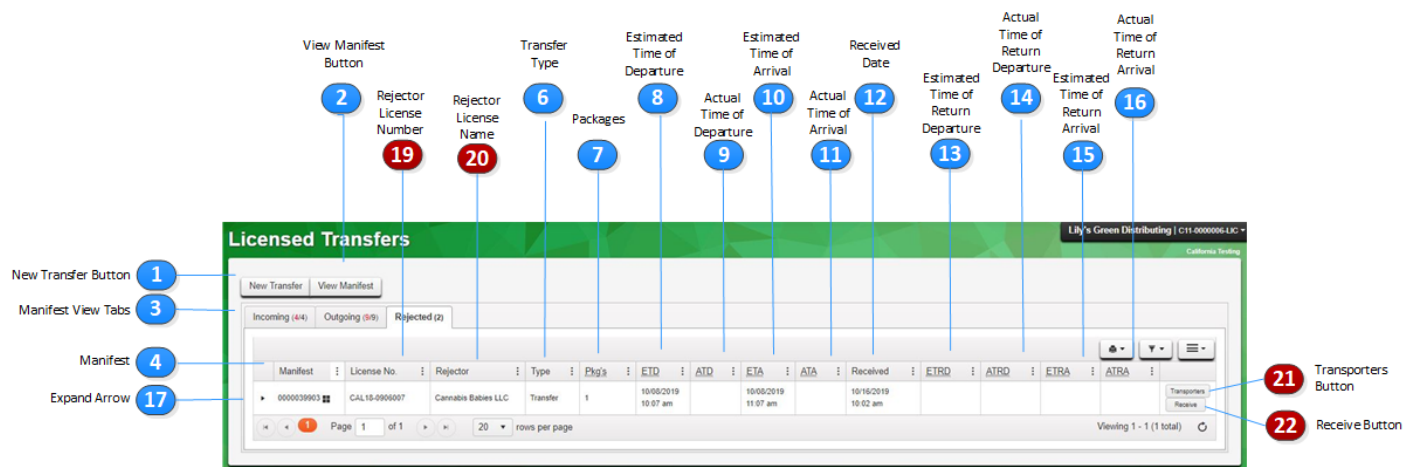


Exhibit 72: Receiving a Rejected Transfer

The *Rejected* tab shown in Exhibit 72 shares many of the same elements as the *Incoming* tab. Please see Section 7.1.6 above for a description of these shared elements. The elements unique to the *Rejected* tab (red annotations) are described below.

#### 19 Rejector License No.

License No. ⋮

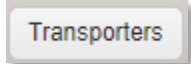
This field displays the license number of the destination facility that rejected one or more packages in the transfer.

#### 20 Rejector License Name

Rejector ⋮

This field displays the license name of the destination facility that rejected one or more packages in the transfer.

## 21 Transporters Button



This button launches the *Edit Return Transporters* page, which allows the originating facility to record the transporter information for the trip to return the rejected packages.

When the *Transporter* button is selected, the *Edit Return Transporters* page displays, as shown in Exhibit 73.

 The screenshot shows a web application window titled "Edit Return Transporters". It contains several input fields and sections:
 

- Manifest:** 0000050902
- Transfer Type:** Transfer
- Originating Lic. No.:** C11-0000009-LIC
- Destination Lic. No.:** C12-0000005-LIC
- Originating Name:** Tibby's Distribution
- Destination Name:** Tibby's Micro Biz
- Main Phone No.:** 5555555555
- Main Phone No.:** 555-129-4874
- Mobile Phone No.:** 5555555555
- Mobile Phone No.:** 555-214-2214
- Delivery Direction:** RETURN // BACK TO ORIGIN
- Est. Departure:** 02/07/2020 today, 06:10 PM
- Est. Arrival:** 02/07/2020 today, 07:30 PM
- Transport #1:** C11-0000009-LIC (with a search icon and a clear button)
- Phone No.:** 123-456-7890 (with a "use default" link)
- Layover:** ☐ Layover
- Driver Selection:** A dropdown menu showing "Joe.Smith (Joe Smith)".
- Vehicle Selection:** A dropdown menu showing "Ford F150 TibbyDistro1".
- Employee ID:** Joe Smith
- Vehicle Make:** Ford
- Driver's Name:** Joe.Smith
- Vehicle Model:** F150
- Driver's Lic. No.:** C123456789
- License Plate:** TibbyDistro1
- Buttons:** "Save Transporters" (green) and "Cancel" (gray).

Exhibit 73: The Edit Return Transporters Page

## 22 Receive Button



The originating facility must select the *Receive* button to put rejected packages back into their package inventory.

When the *Receive* button is selected, the *Receive Rejected Transfer* page displays, as shown in Exhibit 74.

Receive Rejected Transfer			
<b>Manifest</b>	0000000702	<b>Transfer Type</b>	Transfer
<b>Origin Lic. No.</b>	CML17-0000001	<b>Origin Name</b>	Cannabis Farms
<b>Main Phone No.</b>	209-454-9200	<b>Mobile Phone No.</b>	209-454-9287
<b>Transporter Lic. No.</b>	A11-0000002-LIC	<b>Transporter Name</b>	Cannabis Connection
<b>Employee ID</b>	John.Jones@CanConnect.net	<b>Vehicle Make</b>	Ford
<b>Driver's Name</b>	John Jones	<b>Vehicle Model</b>	Ranger
<b>Driver's Lic. No.</b>	C123879007	<b>License Plate</b>	CANTRAN1
<b>Phone No. for Questions</b>	209-454-9200		
<b>Package # 1</b>	1A4FF0100000022000000014	<b>Shipped Qty.</b>	10 ea
<b>Item</b>	Immature Girl Scout	<b>Reject Reason</b>	- Select -
		<b>(optional) Note</b>	
<div> <div>Receive Transfer</div> <div>Cancel</div> </div>			

Exhibit 74: The Receive Rejected Transfer Page

The *Received Rejected Transfer* page is very similar to the *Receive Transfer* page, although the only entries that can be made are *Rejection Reason* and *Notes*. Once the *Receive Transfer* button is selected, the rejected package(s) are put back into the facility's package inventory. A reason for rejecting a package must be entered. A *Note* can also be entered and is optional or required depending on the selected reason.

## 7.2 Licensed Transfers Templates

Licensed transfers made on a regular basis to the same *Destination* licensee utilizing the same *Planned Route*, *Transporter(s)*, *Driver(s)* and/or *Vehicle(s)* can be recorded in Metrc most efficiently when a transfer template is employed.

A template can be used to record these types of transfers with minimal data input to suit the circumstances of a particular transfer and specify the packages to be transferred. The template can also be copied as a starting point to create additional templates.

The *Licensed Transfers Template* page shown in Exhibit 75 is accessed by selecting the *Templates* option from the *Transfers* menu in the top navigation bar.

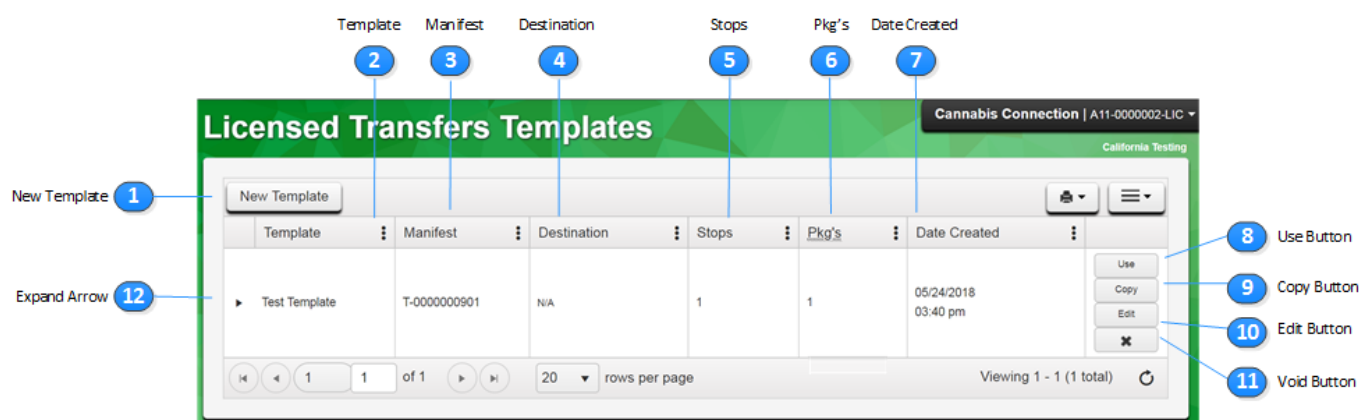
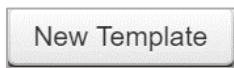


Exhibit 75: The Licensed Transfers Templates Page

1

### New Template



This button launches the *New Licensed Transfer Template* page described in Section 7.2.1 below.

2

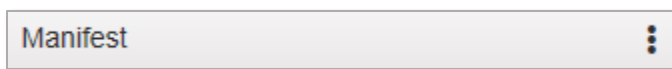
### Template



This field displays the template name.

3

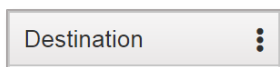
### Manifest



This field displays the unique number assigned to the template.



4

**Destination**A rectangular input field with the text "Destination" and a vertical ellipsis icon on the right side.

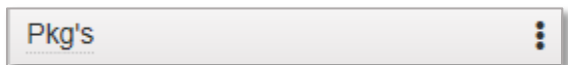
This field displays the *Destination* of the transfer.

5

**Stops**A rectangular input field with the text "Stops" and a vertical ellipsis icon on the right side.

This field displays the number of stops (destinations) specified on the transfer template. In California, only a single destination is included on a manifest.

6

**Packages**A rectangular input field with the text "Pkg's" and a vertical ellipsis icon on the right side.

This field displays the number of packages included on the transfer template. The user can use the *Expand Arrow* to view all *Package* information.

7

**Date Created**A rectangular input field with the text "Date Created" and a vertical ellipsis icon on the right side.

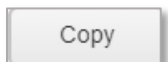
This field displays the date the transfer template was created.

8

**Use Button**A rectangular button with the text "Use".

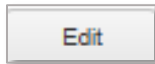
This button launches the *New Licensed Transfer* page (see Section 7.1), pre-populated with the values specified on the selected template.

9

**Copy Button**A rectangular button with the text "Copy".

This button launches the *New Licensed Transfer Template* page, pre-populated with the values specified on the selected template.

10

**Edit Button**

This button launches the *Edit Licensed Transfer Template* page populated with values from the selected transfer template. All fields except the template number are editable.

11

**Discontinue Button**

This button discontinues the selected transfer template so it can no longer be used.

12

**Expand Arrow**

This arrow indicates that there is additional detail available for the row.

Selecting the expand arrow to next to the *Template* name provides information about the *Destination* included on the template.

Destination	Type	Wholesale Price	Packages	ETD	ATD	ETA	ATA	Received	ETRD	ATRD	ETRA	ATRA
<div> <div></div> <div>           N/A-000000-LIC            Cannabis Sales         </div> </div>	Transfer	N/A	1	03/25/2019 01:50 pm		03/25/2019 04:50 pm						

**Exhibit 76: Manifest Destination**

Selecting the expand arrow to next to the *Destination* provides information about the *Transporter(s)* and *Package(s)* specific to the *Destination*.

										<div><div></div></div>	<div><div></div></div>											
Transporter		:	ECI	:	Check-In		:	ECO	:	Check-Out		:										
A11-0000002-LIC																						
Cannabis Connection																						
<div><div><div><div></div></div><div>Page 1 of 1</div><div><div></div></div></div><div>20 rows per page</div></div> <div>Viewing 1 - 1 (1 total)</div>																						
										<div><div></div></div>	<div><div></div></div>											
	Package	:	Harvest	:	Item	:	Category	:	Lab Testing	:	Shipped Qty.	:	Gross Wgt.	:	Ship Whsle. Price	:	Received Qty.	:	Rcv. Whsle. Price	:	Status	:
	<div><div></div><div>1A4FF030000000260000000126</div></div>				Burnt Brownies		Edible (each)		TestPassed		999 ea				N/A				N/A		Shipped	

**Exhibit 77: Destination Transporter and Package Information**

Selecting the expand arrow next to each *Package* displays tabs containing *Lab Results* (if applicable) and the *History* of the package. See Section 6.2 for more information about the content of these tabs.

## 7.2.1 Creating Licensed Transfer Templates

To create a template, select the *New Template* button on the *Licensed Transfers Templates* page to access the *New Licensed Transfer Template* page. The *New Licensed Transfer Template* page is used to specify the name of the template and the values to populate in the template.

The screenshot shows the 'New Licensed Transfer Template' form with the following annotated elements:

- 18** (Red): Name field (Value: Delivery to Retail)
- 1** (Blue): Destination Look-up (Value: C9-000004-LIC)
- 3** (Blue): Planned Route (Value: Take I-80 to the Maple Street exit)
- 2** (Blue): Transfer Type Drop-Down (Value: Wholesale Manifest)
- 4** (Blue): Transfer Schedule (Est. Departure: 03/17/2020 01:00 PM, Est. Arrival: 03/18/2020 05:00 PM)
- 5** (Blue): Transport Look-up (Value: C11-0000006-LIC)
- 6** (Blue): Phone No. (Value: 209-273-8700)
- 7** (Blue): Layover Checkbox (Checked)
- 8** (Blue): Layover Schedule (Est. Check-In: 03/17/2020 08:00 PM, Est. Check-Out: 03/18/2020 06:00 AM)
- 9** (Blue): Driver Look-up Drop-Down (Value: - Lookup -)
- 10** (Blue): Driver Information (Employee ID: John Jones, Driver's Name: John Jones, Driver's Lic. No.: C123456780)
- 11** (Blue): Vehicle Look-up Drop-Down (Value: - Lookup -)
- 12** (Blue): Vehicle Information (Vehicle Make: Ford, Vehicle Model: F150, License Plate: Distro2)
- 13** (Blue): Package Look-up (Value: Type part of Package number...)
- 14** (Blue): Wholesale Price (Value: ex. 100.23)
- 15** (Blue): Add/Subtract Package Button (Value: (package))
- 19** (Red): Register Template Button
- 17** (Blue): Cancel Button

Exhibit 78: The New Licensed Transfer Template Page

The *New Licensed Transfer Template* page shown in Exhibit 78 shares many elements with the *Create a Licensed Transfer* page (blue annotations). Please see the Section 7.1.1 above for a description of these shared elements. The elements unique to the *New Licensed Transfer Template* page (red annotations) are described below.

18

**Name**

Name

Use this field to specify the name of the transfer template.

19

**Register Template Button**

Register Template

Select this button to finalize the creation process and make the transfer template available to create new licensed transfers and additional transfer templates.

## 7.2.2 Editing Licensed Transfer Templates

Select the *Edit* button associated to the transfer template to be updated on the *Licensed Transfers Templates* page to access the *Edit Licensed Transfer Template* page.

The screenshot shows the 'Edit Licensed Transfer Template' form with the following elements annotated:

- 18** (Red): Name (Delivery to Retail)
- 1** (Blue): Destination Look-up (Destination 1: C9-0000004-LIC)
- 3** (Blue): Planned Route (Take I-80 to Maple Street exit)
- 5** (Blue): Transport Look-up (Transport #1: C11-0000006-LIC)
- 6** (Blue): Phone No. (530-839-5700)
- 9** (Blue): Driver Look-up Drop-Down (- Lookup -)
- 10** (Blue): Driver Information (Employee ID: John Jones, Driver's Name: John Jones, Driver's Lic. No.: C123456780)
- 13** (Blue): Package Look-up (Package #1: Type part of Package number...)
- 14** (Blue): Wholesale Price (ex. 100.23)
- 15** (Blue): Add/Subtract Package Button (package)
- 19** (Red): Manifest Template (T-0000000901)
- 2** (Blue): Transfer Type Drop-Down (Wholesale Manifest)
- 4** (Blue): Transfer Schedule (Est. Departure: 03/17/2020, Est. Arrival: 03/18/2020)
- 7** (Blue): Layover Checkbox (checked)
- 8** (Blue): Layover Schedule (Est. Check-In: 03/17/2020, Est. Check-Out: 03/18/2020)
- 11** (Blue): Vehicle Look-up Drop-Down (- Lookup -)
- 12** (Blue): Vehicle Information (Vehicle Make: Ford, Vehicle Model: F150, License Plate: Distro2)
- 20** (Red): Save Template Button
- 17** (Blue): Cancel Button

Exhibit 79: The Edit Licensed Transfer Template Page

The *Edit Licensed Transfer Template* page shown in Exhibit 79 shares many elements with the *New Licensed Transfer* page (blue annotations). Please see the Section 7.1.1 above for a description of these shared elements. The elements unique to the *Edit Licensed Transfer Template* page (red annotations) are described below.

18

**Name**A text input field with a light gray border and a subtle drop shadow. The label "Name" is positioned to the left of the input box, and the word "Transfer" is entered inside the box.

Use this field to change the name of the transfer template.

19

**Manifest Template**A text input field with a light gray border and a subtle drop shadow. The label "Manifest Template" is positioned to the left of the input box, and the unique identifier "T-0000000701" is entered inside the box.

This field displays the unique number assigned to the transfer template.

20

**Save Template Button**A green rectangular button with rounded corners, a dark green border, and a subtle drop shadow. The text "Save Template" is centered on the button in a white, sans-serif font.

Select this button to save the changes made to the transfer template.

## 7.3 Transfers Hub

Licensed Distributors and Testing Laboratories use the *Transfers* menu in the top navigation bar to access the *Transfers Hub* page shown in Exhibit 80 to manage transfers.

The *Transfers Hub* page provides Distributors and Testing Laboratories with the ability to view a manifest, edit transporter information, verify completion of the manifest prior to departure, and record actual departure, arrival, layover check-in, and layover check-out dates/times in real-time.

**Transfers Hub**

View Manifest

Manifest	Origin	Destination	Direction	Driver	Vehicle Info	Pkg's	Accepted	ETD	ATD	ETRD	ATRD	ECI	ACI	ECO	ACO	ETA	ATA	ETRA	ATRA
0000055801	CIO-000000-UC Tibby's Micro Bz	CDPH-000000-UC Tibby's Manufacturing	Return	Tom Thomas	State Dodge Model Ram LC Plate T88AN001	1		03/18/2020 10:00 am	03/18/2020 10:04 am	03/18/2020 10:20 am		03/18/2020 07:00 pm		03/18/2020 08:00 am		03/18/2020 12:00 pm	03/18/2020 10:14 am	03/18/2020 05:00 pm	
0000000001	CIO-000000-UC Tibby's Micro Bz	CDPH-000000-UC Tibby's Manufacturing	Outbound	Tom Thomas	State Dodge Model Ram LC Plate T88AN001	1		03/18/2020 10:04 am	03/18/2020 10:20 am	03/18/2020 10:20 am		03/18/2020 08:00 pm	03/18/2020 10:09 am	03/18/2020 07:00 am	03/18/2020 10:12 am	03/18/2020 12:00 pm	03/18/2020 10:14 am	03/18/2020 05:00 pm	

Page 1 of 1 20 rows per page Viewing 1 - 2 (2 total)

Callouts: 1. View Manifest Button, 2. Manifest, 3. Origin, 4. Destination, 5. Direction, 6. Driver, 7. Vehicle Info, 8. Packages, 9. Accepted, 10. Estimated Time of Departure, 11. Actual Time of Departure, 12. Estimated Time of Return, 13. Actual Time of Return, 14. Estimated Time of Check-in, 15. Actual Time of Check-in, 16. Estimated Time of Check-out, 17. Actual Time of Check-out, 18. Estimated Time of Arrival, 19. Actual Time of Arrival, 20. Estimated Time of Return, 21. Actual Time of Return, 22. Estimated Time of Layover, 23. Actual Time of Layover, 24. Depart Button, 25. Check-in Button, 26. Check-out Button, 27. Arrive Button, 28. Check-out Button.

Exhibit 80: The Transfers Hub Page

1

### View Manifest

View Manifest

Select this button to view an existing manifest. First highlight the manifest for viewing. The new manifest is created in a PDF format, so this will take a few moments. The manifest can then be printed.

2

### Manifest

Manifest

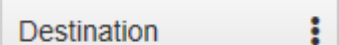
This field displays the unique manifest number.

3

**Origin**A rectangular button with the text "Origin" and a vertical ellipsis icon on the right side.

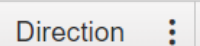
This field displays the *License Number* and *Facility Name* that created the transfer.

4

**Destination**A rectangular button with the text "Destination" and a vertical ellipsis icon on the right side.


This field displays the *License Number* and *Facility Name* that will receive the transfer.

5

**Direction**A rectangular button with the text "Direction" and a vertical ellipsis icon on the right side.

This field displays the direction (Outbound or Return) of the transfer.

6

**Driver**A rectangular button with the text "Driver" and a vertical ellipsis icon on the right side.

This field displays the name of the driver assigned to complete the transfer.

7

**Vehicle Info**A rectangular button with the text "Vehicle Info" and a vertical ellipsis icon on the right side.

This field displays the vehicle assigned to perform the delivery by *Make*, *Model* and *License Plate Number*.

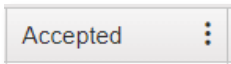
8

**Packages**A rectangular button with the text "Pkg's" and a vertical ellipsis icon on the right side.

This field displays the number of packages being moved in that transfer.



9

**Accepted**

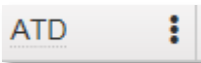
This field displays the date and time the Distributor completed and confirmed the manifest using the *Distributor Completed Manifest* button.

10

**ETD (Estimated Time of Departure)**

This field displays the date/time the transfer is scheduled to leave the point of origin as recorded on the transfer manifest for that particular transfer.

11

**ATD (Actual Time of Departure)**

This field displays the date/time the transfer left the point of origin, populated with the date/time the Transporter selected the *Depart* button for the manifest.

12

**ETRD (Estimated Time of Return Departure)**

This field displays the date/time the transfer is scheduled to leave the destination that rejected the package(s).

13

**ATRD (Actual Time of Return Departure)**

This field displays the date/time the return transfer left the destination facility, populated with the date/time the Transporter selected the *Arrive* button for the return transfer.

14

**ECI (Estimated Time of Check-in)**

This field displays the date/time the Transporter is scheduled to arrive at the layover location as recorded on the transfer manifest for that particular transfer.

15

**ACI (Actual Time of Check-in)**

This field displays the date/time the Transporter arrived at the layover location, populated with the date/time the Transporter selected the *Check-In* button for the manifest.

16

**ECO (Estimated Time of Check-out)**

This field displays the date/time the Transporter is scheduled to depart from the layover location as recorded on the transfer manifest for that particular transfer.

17

**ACO (Actual Time of Check-out)**

This field displays the date/time the Transporter departed from the layover location, populated with the date/time the Transporter selected the *Check-Out* button for the manifest.

18

**ETA (Estimated Time of Arrival)**

This field displays the date/time the transfer is scheduled to arrive at the destination facility as recorded on the transfer manifest for that particular transfer.

19

**ATA (Actual time of Arrival)**

This field displays the date/time the transfer arrived at the Destination facility, populated with the date/time the Transporter selected the *Arrive* button for the manifest.

20

**ETRA (Estimated Time of Return Arrival)**

This field displays the date/time the return transfer is scheduled to arrive at the origin facility with the rejected package(s).

21

**ATRA (Actual Time of Return Arrival)**

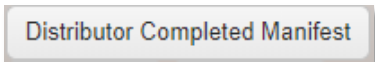
This field displays the date/time the return transfer arrived at the origin facility, populated with the date/time the Transporter selected the *Arrive* button for the return transfer.

22

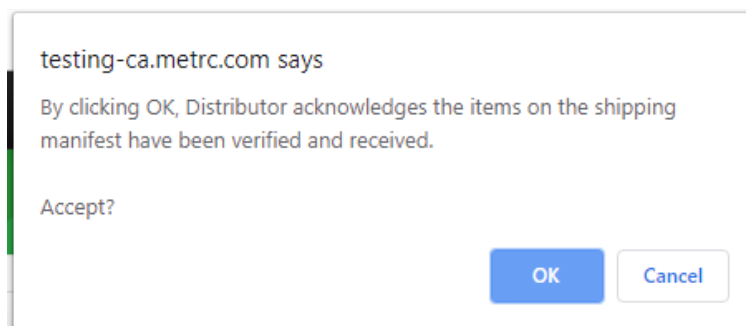
**Edit Button**

Press this button to display the *Edit Transporter Info* page. The *Edit Transporter Info* page allows the Transporter to edit estimated departure and arrival times, as well as the assigned driver and vehicle information on the manifest. Once the *Arrive* button has been selected on the *Transfers Hub*, the *Edit* button is no longer available.

23

**Distributor Completed Manifest Button**

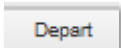
This button enables the Distributor to confirm the items on the manifest prior to departure. When the button is selected, a prompt displays for the Distributor to confirm the action, as shown in Exhibit 81 below.



**Exhibit 81: The Complete Manifest Confirmation Message**

24

### Depart Button



This button enables the Transporter to record the actual departure date/time from the Originating facility. When the *Depart* button is selected, a prompt displays for the user to confirm the action, as shown in Exhibit 82.

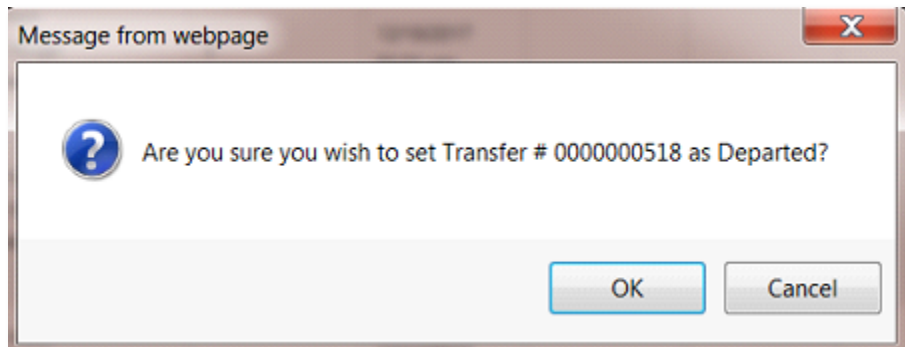
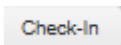


Exhibit 82: The Departure Confirmation Message

25

### Check-In Button



This button enables the Transporter to record the actual arrival date/time at the layover location. When the *Check-In* button is selected, a prompt displays for the user to confirm the action. The *Check-In* button displays only if a scheduled layover is recorded for the Transporter.

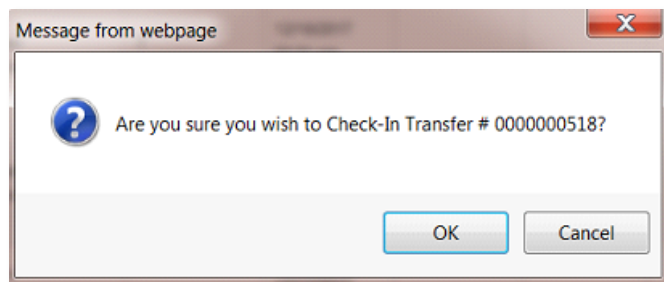
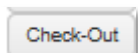
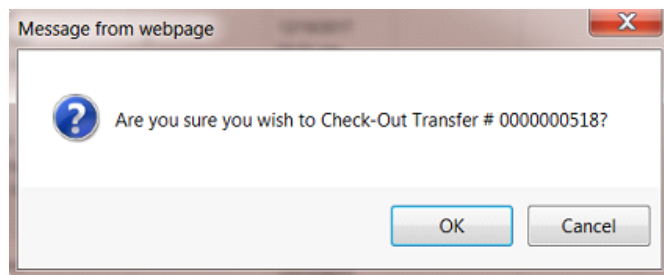


Exhibit 83: The Layover Check-In Confirmation Message

26

**Check-Out Button**

This button enables the Transporter to record the actual departure date/time from the layover location. When the *Check-Out* button is selected, a prompt displays for the user to confirm the action. The *Check-Out* button displays only if a scheduled layover is recorded for the Transporter.

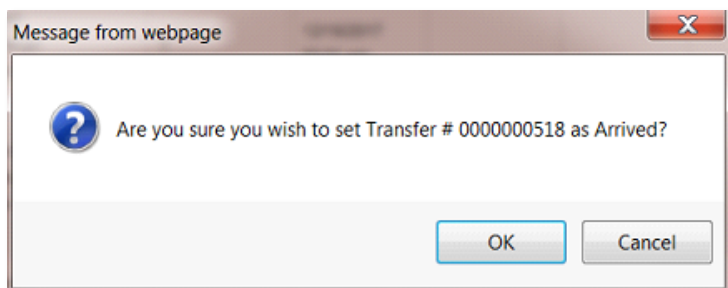


**Exhibit 84: The Layover Check-Out Confirmation Message**

27

**Arrive Button**

This button enables the Transporter to record the actual arrival date/time at the *Destination* facility. When the *Arrive* button is selected, a prompt displays for the user to confirm the action, as shown in Exhibit 85.



**Exhibit 85: The Arrival Confirmation Message**

28

**Expand Arrow**

This arrow indicates that the file has additional detail available for viewing. Selecting this arrow displays information on the packages included on the manifest for that particular transfer.

### 7.3.1 Editing Transporter Information

Select the *Edit* button associated to the transfer to be updated on the *Transfers Hub* page to access the *Edit Transporter Info* page.

The screenshot shows the 'Edit Transporter Info' form with the following fields and callouts:

- 1** Estimated Departure: Points to the 'Est. Departure' date and time field (03/18/2020, 10:20 AM).
- 2** Estimated Arrival: Points to the 'Est. Arrival' date and time field (03/19/2020, 05:00 PM).
- 3** Estimated Check-In: Points to the 'Est. Check-In' date and time field (03/18/2020, 07:00 PM).
- 4** Estimated Check-Out: Points to the 'Est. Check-Out' date and time field (03/19/2020, 08:00 AM).
- 5** Driver Lookup: Points to the 'Driver's Lic. No.' field (C4567890123).
- 6** Driver Information: Points to the 'Driver's Name' field (Tom Thomas).
- 7** Vehicle Lookup: Points to the 'Vehicle Make' field (Dodge).
- 8** Vehicle Information: Points to the 'Vehicle Model' field (Ram).
- 9** Update Transporter Info Button: Points to the 'Update Transporter Info' button at the bottom.

The form also includes fields for Manifest (0000055801), Transfer Type (Transfer), Originating Lic. No. (C12-0000005-LIC), Destination Lic. No. (CDPH-10003167), Originating Name (Tibby's Micro Biz), Destination Name (Tibby's Manufacturing), Main Phone No. (555-129-4874), and Mobile Phone No. (555-214-2214).

Exhibit 86: The Edit Transporter Info Page

Only fields related to the transporter are editable on the *Edit Transporter Info* page. These editable fields are described below.

1

**Estimated Departure**

Use the *Estimated Departure* field to update the estimated date/time for the departure from the *Origin* facility. Data can be manually entered or created using the calendar date/time functions. Once the *Depart* button has been selected on the *Transfers Hub*, the *Est. Departure* cannot be updated.

2

**Estimated Arrival**

Use the *Estimated Arrival* field to update the expected date/time for the arrival of the shipment at the *Destination* facility. Data can be manually entered or created using the calendar date/time functions. Once the *Arrive* button has been selected on the *Transfers Hub*, the transporter information on the manifest is no longer editable.

3

**Estimated Check-In**

Use the *Estimated Check-In* field to update the estimated arrival date/time at the layover location, if applicable. Data can be manually entered or created using the calendar/time functions. Once the *Check-In* button has been selected on the *Transfers Hub*, the *Estimated Check-In* cannot be updated.

4

#### Estimated Check-Out

Use the *Estimated Check-Out* field to update the estimated departure date/time at the layover location, if applicable. Data can be manually entered or created using the calendar/time functions. Once the *Check-Out* button has been selected on the *Transfers Hub*, the *Estimated Check-Out* cannot be updated.

5

#### Driver Lookup

This drop-down displays a list of drivers previously entered into the Driver Information field. This includes Employee ID, Driver's Name, and Driver's Lic. No. Driver information is not associated with vehicles.

6

#### Driver Information

Use the Driver Information section to update the *Employee ID*, *Driver's Name* and *Driver's License Number*. The *Employee ID* is a required field that can be used at the licensee's discretion to record an employee internal business ID number or other distinguishing employee identifier.

7

#### Vehicle Lookup

This drop-down displays a list of vehicles previously entered into the *Vehicle Information* field. This includes *Vehicle Make*, *Vehicle Model*, and *License Plate*. Vehicle information is not associated with the driver.



8

**Vehicle Information**

Vehicle Make	<input type="text" value="Honda"/>
Vehicle Model	<input type="text" value="Accord"/>
License Plate	<input type="text" value="CANCON21"/>

Use the *Vehicle Information* section to update the *Vehicle Make*, *Vehicle Model*, and *License Plate*.

9

**Update Transporter Info Button**

<input type="button" value="Update Transporter Info"/>
--------------------------------------------------------

Select this button to update the transporter information on the manifest.

## 8 Sales

Sales are reported by the industry to record the transfer of cannabis products to a consumer, patient or caregiver.

### 8.1 Entering Sales

Sales information is only captured after a Retailer License number has been selected. Recording sales is required for reporting the last event in the chain of custody.

Sales may be entered in two ways:

- Manually
- Data Import (via CSV file upload or API from a Third-Party Vendor that has completed the certification process with Metrc and the State)

Sales may also be entered from a POS system and must be entered within 24 hours of occurrence. In addition, physical inventory must be reconciled with Metrc at least once every 30 days.

#### 8.1.1 Sales Receipts

From the *Sales* menu in the top navigation bar select the *Receipts* option to access the *Sales Receipts* page as shown in Exhibit 87. Select the button applicable to the action to be taken. Each button on the *Active* and *Inactive* tabs of the *Sales Receipts* page is described below.

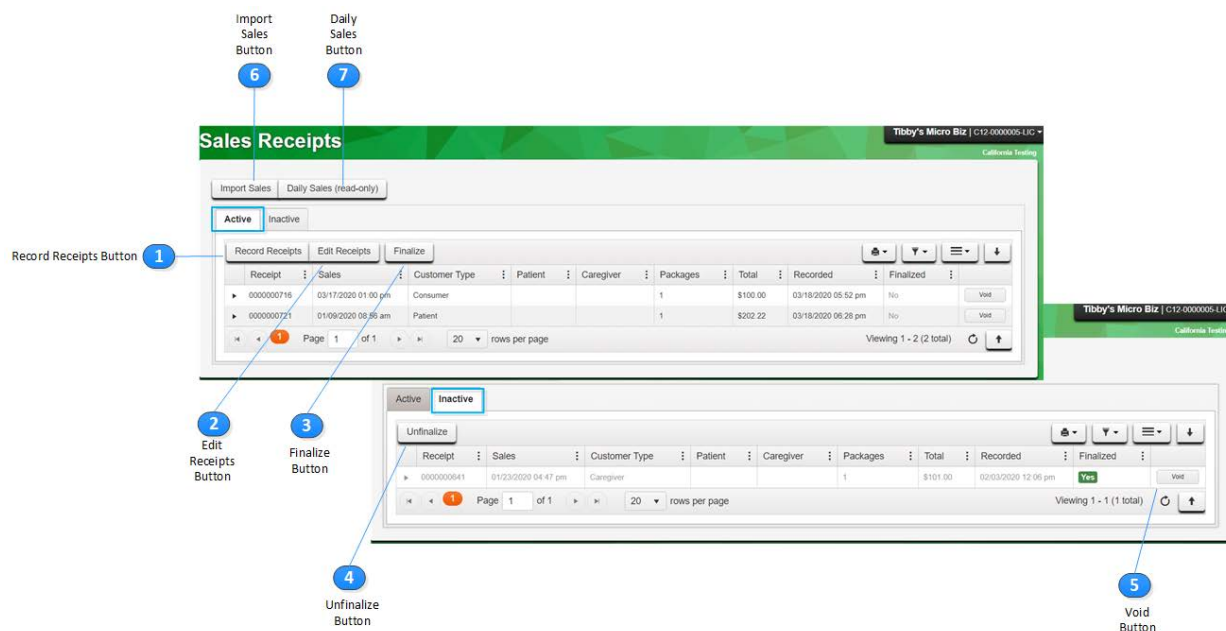


Exhibit 87: The Sales Receipts Page Buttons

1

**Record Receipts Button**

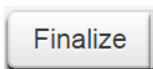
Select this button to launch the *Record Receipts* page for manual sales receipt entry.

2

**Edit Receipts Button**

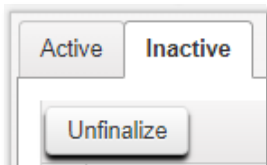
Select this button to launch the *Edit Receipts* page to edit manual sales receipts.

3

**Finalize Button**

To improve response time when looking up receipts on the *Edit Receipts* page, mark receipts as *finalized* by highlighting a receipt or multiple receipts and then selecting the *Finalize* button. A *finalized* receipt moves to the *Inactive* tab of the *Sales Receipt* page and cannot be selected for editing.

4

**Unfinalize Button**

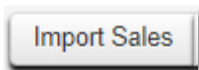
Use the *Unfinalize* button on the *Inactive* tab if it becomes necessary to edit a receipt that was previously indicated as *finalized*. Highlight the receipt(s) to be marked as *unfinalized* and select the *Unfinalize* button. An *unfinalized* receipt moves to the *Active* tab of the *Sales Receipts* page where it can be selected for editing.

5

**Void Button**

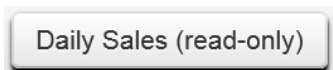
Select this button to remove a sales receipt on either the *Active* or *Inactive* tab.

6

**Import Sales Button**

Select the *Import Sales* button to launch the *Data Import* page to upload a Point of Sale (POS) comma separated value (CSV) file into Metrc.

7

**Daily Sales Button**

Select this button to launch the *Daily Sales* page to view daily sales transactions. This page will not be populated with any data, as California does not use this method of recording sales.

## 8.1.2 Manually Entering Sales

Sales must be entered daily for each individual sales transaction. The following information is required in order to enter sales manually:

1. The date and time each sale took place.
2. The type of customer that made the purchase.
3. The *Metrc Package ID* for each package involved in the sale.
4. The quantity sold from each *Metrc* package.
5. The *Unit of Measure* in *Metrc* for each package.
6. The total dollar amount sold from each package before tax and after any discount was given.

Once the required information is available, enter sales on the *Record Receipts* page described in Section 8.1.2.1 below using the following steps:

1. Select the date and time the sale occurred.
2. Select the type of customer: *Consumer* (adult-use), *Patient*, or *Caregiver*.
3. Enter the *Package ID* by either typing in the last three (3) numbers of the package, or use the magnifying glass icon to find the package.
4. Enter the *Quantity sold*.
5. Enter the *Unit of Measure* in *Metrc*.
6. Enter the *Total Price* sold for that package before tax and after any discount was given.
7. Press the blue *Add +* (packages) button to add packages to the *Sales Receipt* as necessary and repeat steps 3 through 6.
8. Press the *Add +* (sales receipts) button and repeat steps 1 through 7 as necessary to add multiple *Sales Receipts* simultaneously.
9. Select the green *Record Sales Receipt* button at the bottom of the page to record all the sales.

*Sales Receipts* are editable (including the ability to update date/time, type of customer, quantity, price, and package details) using the *Edit Receipts* button on the *Sales Receipts* page and removable using the *Void* button on the *Sales Receipts* page.

### 8.1.2.1 Record Receipts

To access the *Record Receipts* page, select the *Record Receipts* button on the *Sales Receipts* page shown in Exhibit 87 above.

The screenshot shows the 'Record Receipts' form with the following numbered callouts:

- 1** Sale Date/Time: A date/time picker showing 08/13/2018 and 03:25 PM.
- 2** Customer Type: Radio buttons for Consumer, Patient, and Caregiver (selected).
- 3** Caregiver No.: An optional text input field.
- 4** Patient No.: An optional text input field.
- 5** Package ID: A text input field containing '1A4FF0300000026000000110'.
- 6** Available: A text input field containing '200 ea'.
- 7** Quantity: A text input field containing '5'.
- 8** Total Price: A text input field containing '\$ 25.00'.
- 9** Add/Subtract Package Buttons: A button with a plus/minus icon and the text '(package)'.
- 10** Add/Subtract Sales Receipt Buttons: A blue plus button.
- 11** Record Sales Receipts Button: A green button at the bottom.
- 12** Cancel Button: A white button at the bottom.

Exhibit 88: The Record Receipts Page

1

#### Sale Date/Time

A close-up of the 'Sale Date/Time' field, showing a date picker for 06/05/2018 and a time picker for 12:33 PM.

Use *Sale Date/Time* fields to enter the date/time for the sale took place. Data can be manually entered or selected using the calendar date/time functions.

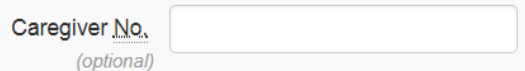
2

#### Customer Type

A close-up of the 'Customer' field, showing three radio button options: Consumer, Patient, and Caregiver (selected).

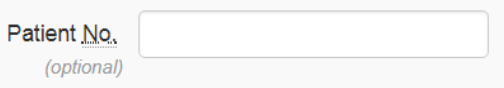
Use this field to specify the type of customer involved in the sale: *Consumer* (adult-use), *Patient* or *Caregiver*. When recording a donation to a medicinal cannabis patient or their primary caregiver, the *Customer Type* must be set to *Patient* or *Caregiver*.

3

**Caregiver No.**


This field is enabled when a *Customer Type* of *Caregiver* is selected. California does not require that the *Caregiver* be tracked, so an entry in this field is not required.

4

**Patient No.**


This field is enabled when a *Customer Type* of *Patient* or *Caregiver* is selected. California does not require that the *Patient* be tracked, so an entry in this field is not required.

5

**Package ID**

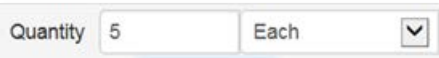

Use this field to look-up the *Package ID* involved in the sale.

6

**Available**


This is a read-only field indicating the quantity in the package.

7

**Quantity**


Use this field to indicate the *Quantity* sold from the package.

8

**Total Price**

Total Price	\$	25.00
-------------	----	-------

Use this field to record the *Total Price* of the sale from the package before tax and after any discount was given. When recording a donation to a medicinal cannabis patient or their primary caregiver, the *Total Price* of the sale must be entered as \$0.00.

9

**Add/Subtract Package Buttons**

Press the *Add* (plus) button to add additional packages to the *Sales Receipt* as required.

Press the *Subtract* (minus) button to remove the corresponding packages from the *Sales Receipt*. This button only displays when a subsequent package has been added.

10

**Add/Subtract Sales Receipts Buttons**

Press the *Add* (plus) button to record additional *Sales Receipts* simultaneously. Press the *Subtract* (minus) button to remove the corresponding *Sales Receipts*. This button only displays when a subsequent *Sales Receipt* has been added.

11

**Record Sales Receipts Button**

Select this button to save the *Sales Receipts*.


12

**Cancel Button**

Select this button to prevent the *Sales Receipts* from being recorded.



## 9 Data Import

The *Data Import* page is accessed using the  upload icon on the top navigation bar or from the *Sales Receipt* page by selecting the *Import Sales* button. The functions that are offered for upload are listed below:

1. Create Plantings / Plantings from Plants / Plantings from Packages
2. Immature Plants Growth Phase
3. Record Immature Plants Waste
4. Immature Plants Packages
5. Destroy Immature Plants
6. Plants Location
7. Plants Growth Phase
8. Record Plants Waste
9. Manicure Plants
10. Harvest Plants
11. Destroy Plants
12. Packages from Harvest
13. Lab Results
14. Package Adjustment
15. Sales (new)
16. Sales (update)

If uploading multiple types of CSV files, it is recommended that they be uploaded in the order listed above to avoid data collisions. For instance, if uploading a CSV to Manicure Plants and another to Destroy Plants and the same plant is included on both files, the manicure must be recorded prior to the destruction of the plant.

Except for Lab Results, all CSV files are limited to 500 rows per file. When adding plants to the same harvest or manicure batch using multiple CSV files, it is recommended that they be uploaded one file at a time.

Please reference the *CA CSV Guide* available under the *Metric Support* menu for additional Data Import assistance.

Exhibit 89 shows the features of the *Data Import* page.

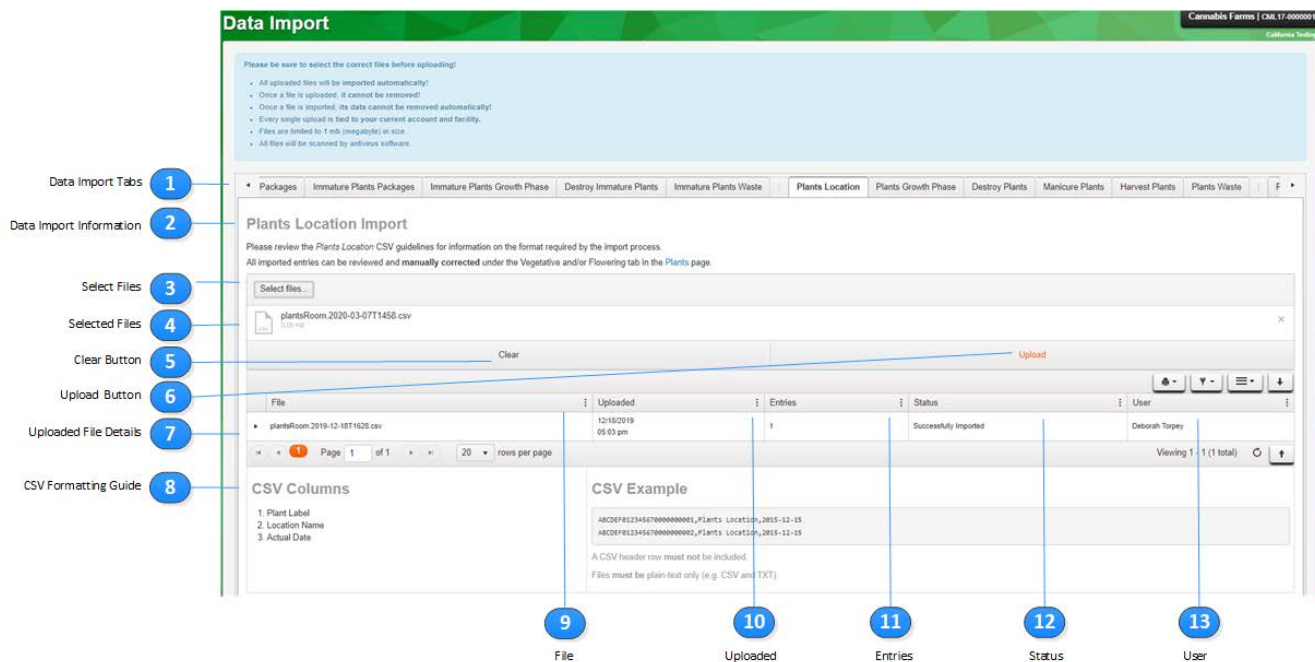


Exhibit 89: The Data Import Page

1

### Data Import Tabs

There is a separate tab for each type of CSV file. The tabs that display are specific to a facility's/employee's permissions to perform that type of action in Metrc.

#### Immature Plants Actions:

Create Plantings	Plantings from Plants	Plantings from Packages	Immature Plants Packages	Immature Plants Growth Phase	Destroy Immature Plants	Immature Plants Waste
------------------	-----------------------	-------------------------	--------------------------	------------------------------	-------------------------	-----------------------

#### Flowering Plant Actions:

Plants Location	Plants Growth Phase	Destroy Plants	Manicure Plants	Harvest Plants	Plants Waste
-----------------	---------------------	----------------	-----------------	----------------	--------------

#### Harvest Actions:

Packages from Harvest
-----------------------

#### Package Actions:

Package Adj.
--------------

#### Lab Actions:

Lab Results
-------------

#### Sales Actions:

Sales (new)	Sales (update)
-------------	----------------

2

## Data Import Information

### Package Adjustments Import

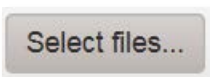
Please review the *Package Adjustments* CSV guidelines for information on the format required by the import process.

All imported entries can be reviewed and **manually corrected** under the Active tab in the [Packages](#) page.

The *Data Import Information* section provides helpful information related to the type of CSV file being uploaded.

3

## Select Files



The *Select Files* button allows the user to browse their computer/network to specify the CSV file to be uploaded. Files can also be dropped into this area for upload. Multiple files can be uploaded at one time.

4

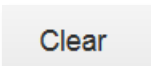
## Selected Files



This is a list of CSV files which have selected for upload.

5

## Clear Button



The *Clear* button is enabled only when CSV files have been selected for upload. Clicking the *Clear* button removes all the files listed in the *Selected Files* section.

6

## Upload Button



The *Upload* button is enabled only when CSV files have been selected for upload. Clicking the *Upload* button initiates the process to upload all the files listed in the *Selected Files* section.

7

## Uploaded File Details

File	Uploaded	Entries	Status	User
------	----------	---------	--------	------

The *Uploaded File Details* section lists the CSV files that have been uploaded for the facility on that specific tab. See below for a description of each field.

8

## CSV Formatting Guide

CSV Columns	CSV Example
1. Plant Label 2. Harvested Weight 3. Unit of Weight 4. Drying Location Name 5. Harvest Name 6. Patient License Number 7. Actual Date	<pre>           ABCDEF012345670000010011,100.23,Grams,Harvest Location,2015-12-15,Harvest Location-H,X00001,2015-12-15           ABCDEF012345670000010012,10.15,Grams,Harvest Location,,X00002,2015-12-15           </pre> <p>A CSV header row <b>must not</b> be included.</p> <p>Files must be plain-text only (e.g. CSV and TXT).</p>

This section lists the CSV columns specific for each import action along with an example.

9

## File

File
------

The *File* field provides the name and location of the file that was uploaded.

10

## Uploaded

Uploaded
----------

The *Uploaded* field provides the date and time the file that was uploaded.

11

## Entries


Entries
---------

The *Entries* field lists the number of records on the uploaded file.

12

**Status**

Status

The *Status* field provides the outcome of the upload. If successful, the status will be *Successfully Imported*. If an error occurs during processing, the status will display as *Error - Not Imported*. Clicking the  next the record will provide details of the error(s).

File	Uploaded	Entries	Status	User
C:\changePlantsRoom.2018-03-15T1727.csv	03/14/2018 06:28 pm	1	Error - Not Imported	John Jones

Row	Message
1	Room "Flower A" does not exist in the current Facility.

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

14 Row 15 Message

The *Row* the error occurred on and a *Message* describing the error are provided for trouble-shooting purposes. When an error occurs, none of the records on the CSV file are processed.

13

**User**

User

The *User* field lists the name of the employee that uploaded the file.

14

**Row**

Row

The *Row* field lists the row in the CSV file that contained the error.

15

**Message**

Message

The *Message* field describes the error encountered on the specified row in the CSV file.