Metrc Support Bulletin

Bulletin Number: MD_IB_42	Distribution Date: 05/27/2020	Effective Date: 6/1/2020
Contact Point: Metrc® Support	Subject: Lab Testing Updates and New Features in Metrc	
Reason: To inform Licensees of Upcoming Changes to upload and view COAs, enter Required Test Batches, and enhancements around plant batches, additional fields, editing sales, and an updated CSV guide		

Metrc is pleased to provide information on our upcoming enhancements within the software that will be available on **June 1st, 2020.**

- Testing laboratories will now be able to upload a Certificate of Analysis (COA) and associate it to all recorded test results on a specific sample using a new button in Metrc or through the API using third party software upgraded to use the new feature.

- Once Testing Facilities have uploaded the COA, both Testing Facilities and Licensees with the proper permissions will be able to view the uploaded COA via the Lab Samples Tab on Packages and Manifests.

In addition to the ability for COA uploading and viewing functionality, the MMCC will be changing the configuration of the Lab Test Batches. This change will mean that one lab test batch will be selected when creating a test sample based on the type of item being tested. The lab test batches that will be available are:

- Hemp Concentrate
- Hemp Raw Plant Material
- Infused Non-Edible
- Inhalable/Vape Concentrate
- Non-Solvent Based Concentrate
- R&D Testing
- Raw Plant Material
- Retest
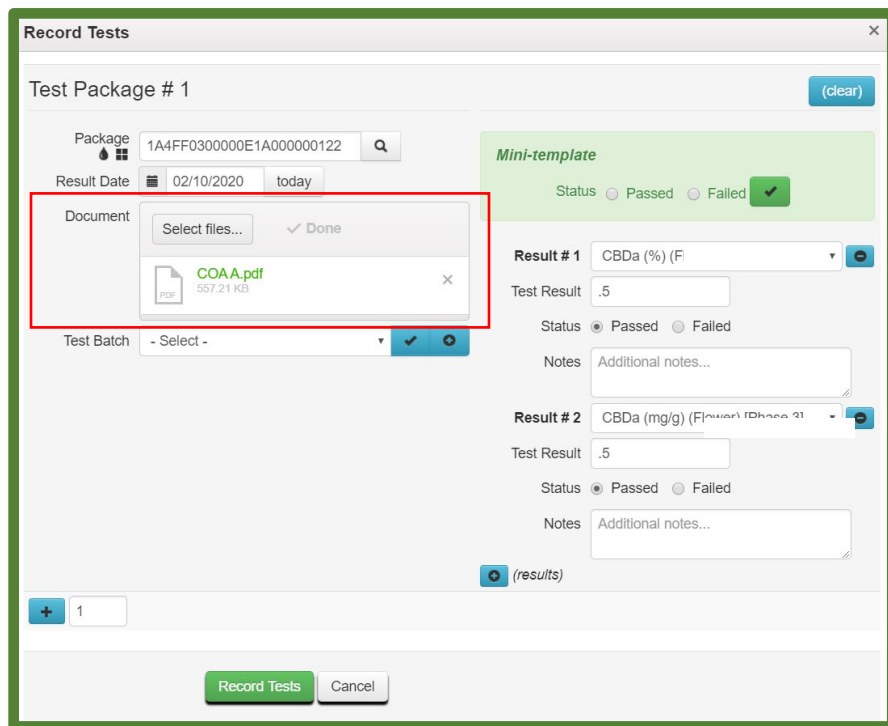- Solvent Based Concentrate
- Stability Studies

Lastly, the following additional new features will be included in the release:

I. Additional Functionality for Plant Batches
II. Added "Packaged By" field to all Package popovers
III. Added the "Strain" column to Lab Samples grids
IV. Finished Packages must be unfinished before users can edit or record sales to the package
V. Updated CSV Upload Guide

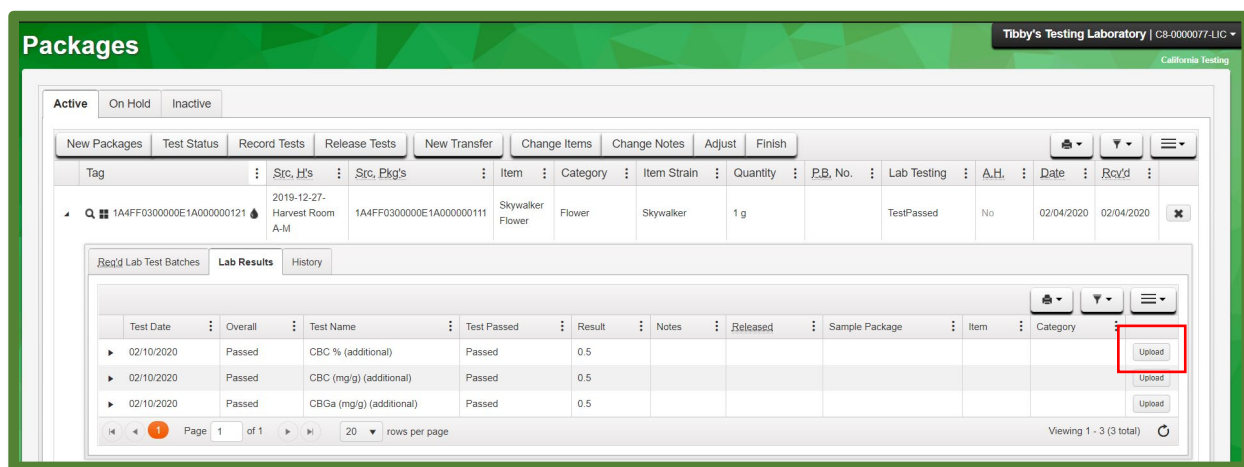Please see the following pages for details on these changes:

Uploading a COA

Testing Facilities will now be able to upload a COA while they record test results on the *Record Tests* action window, as shown in **Figure 1** below.

Figure 1: Uploading a COA with Test Results

This update provides the added flexibility to Testing Facilities to only upload a COA after test results have been recorded using the new *Upload* button shown in **Figure 2** below.
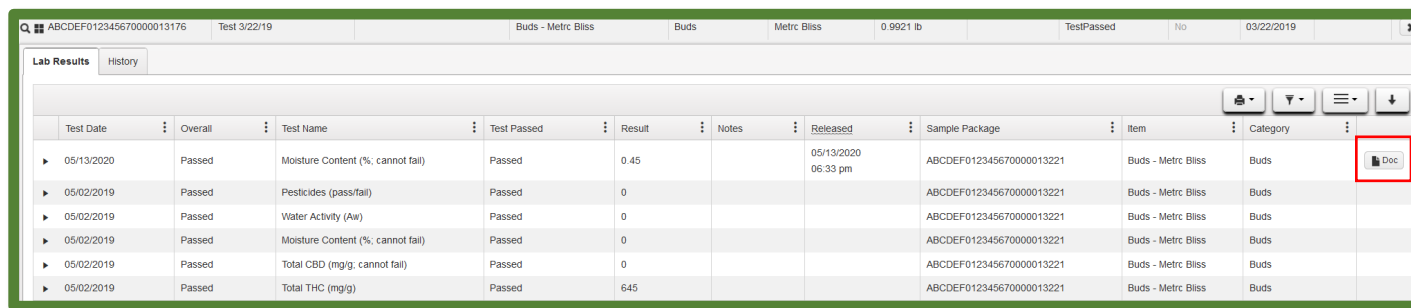

Figure 2: Upload COA Button

Also, a COA can be uploaded with test results or separately from test results through the API using third party software with this ability.

Viewing A COA from Packages Grid

Once a Testing Facility has entered, or imported test results and the COA has been uploaded into Metrc, the test results will show in the Lab Results tab. The COA can be downloaded to be viewed and/or printed by selecting the 📄 Doc in the Lab Results tab.
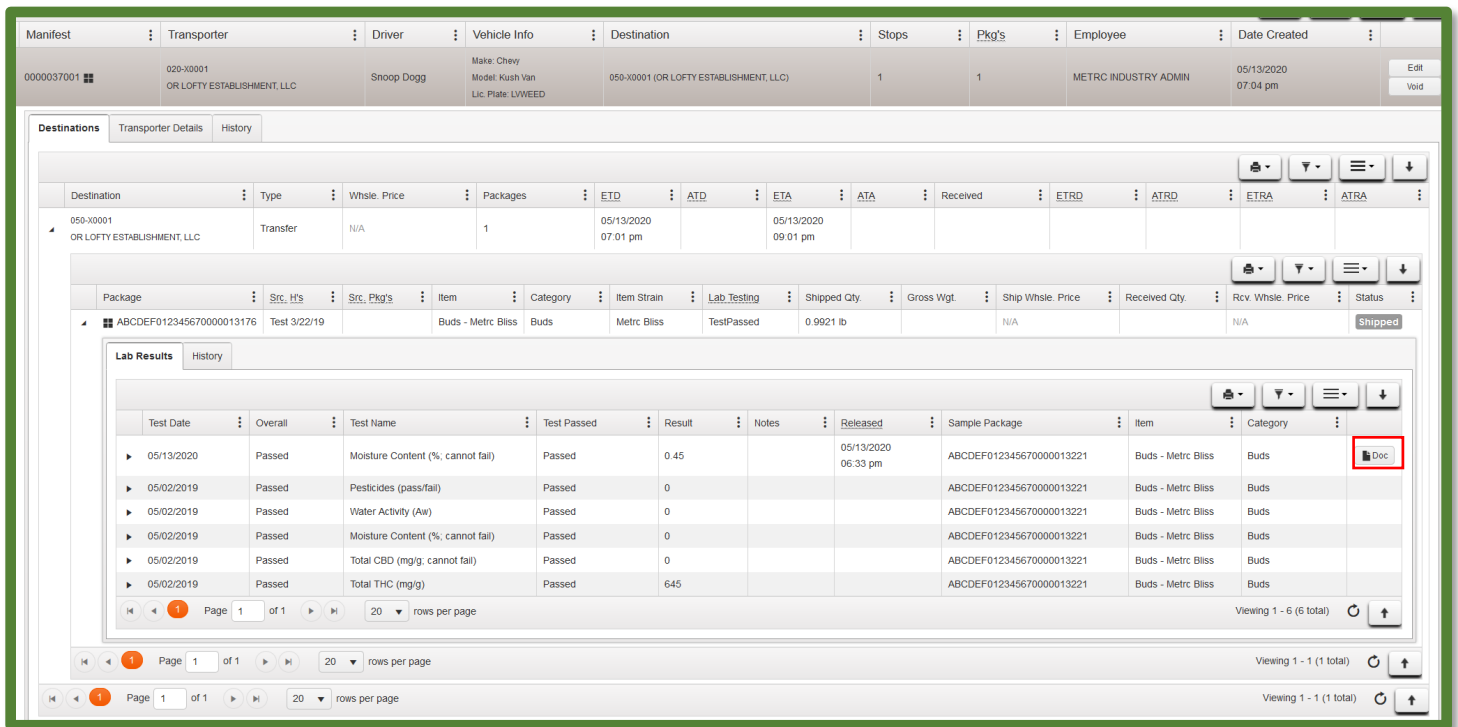
	Test Date	Overall	Test Name	Test Passed	Result	Notes	Released	Sample Package	Item	Category	
▸	05/13/2020	Passed	Moisture Content (%; cannot fail)	Passed	0.45		05/13/2020 06:33 pm	ABCDEF012345670000013221	Buds - Metrc Bliss	Buds	📄 Doc
▸	05/02/2019	Passed	Pesticides (pass/fail)	Passed	0			ABCDEF012345670000013221	Buds - Metrc Bliss	Buds	
▸	05/02/2019	Passed	Water Activity (Aw)	Passed	0			ABCDEF012345670000013221	Buds - Metrc Bliss	Buds	
▸	05/02/2019	Passed	Moisture Content (%; cannot fail)	Passed	0			ABCDEF012345670000013221	Buds - Metrc Bliss	Buds	
▸	05/02/2019	Passed	Total CBD (mg/g; cannot fail)	Passed	0			ABCDEF012345670000013221	Buds - Metrc Bliss	Buds	
▸	05/02/2019	Passed	Total THC (mg/g)	Passed	645			ABCDEF012345670000013221	Buds - Metrc Bliss	Buds	

Figure 3: Selecting the Doc button to download COA

Viewing COA from Transfer/Manifest Grid

The COA is also able to be downloaded via the Transfer/Manifest as well as seen in **Figure 4** below. This document can be viewed by going to the Transfers Area and selecting Licensed Transfers. Once in the Licensed Transfers grid, find the manifest desired. Once the manifest is located, click the caret to the left of the manifest and click the Destinations tab. On the Destinations tab, click on the caret to the left of the destination licensee. To view the COA for a specific package, click the caret to the left of the package and click the Lab Results tab. In the Lab Results tab, the individual test results can be viewed as well as the Doc button at the far right of the test result(s). The 📄 Doc button can be selected in order to download the COA for viewing and/or printing.

Figure 4: Download COA from Transfer Manifest

Creating a Test Sample with Required Lab Test Batches

Once these system changes occur, it will be required to indicate the required lab test batch when creating a test sample package for transfer to the testing facilities. First, select the package that was sampled in Metrc then select the "Submit for Testing" button, as seen in **Figure 5**.
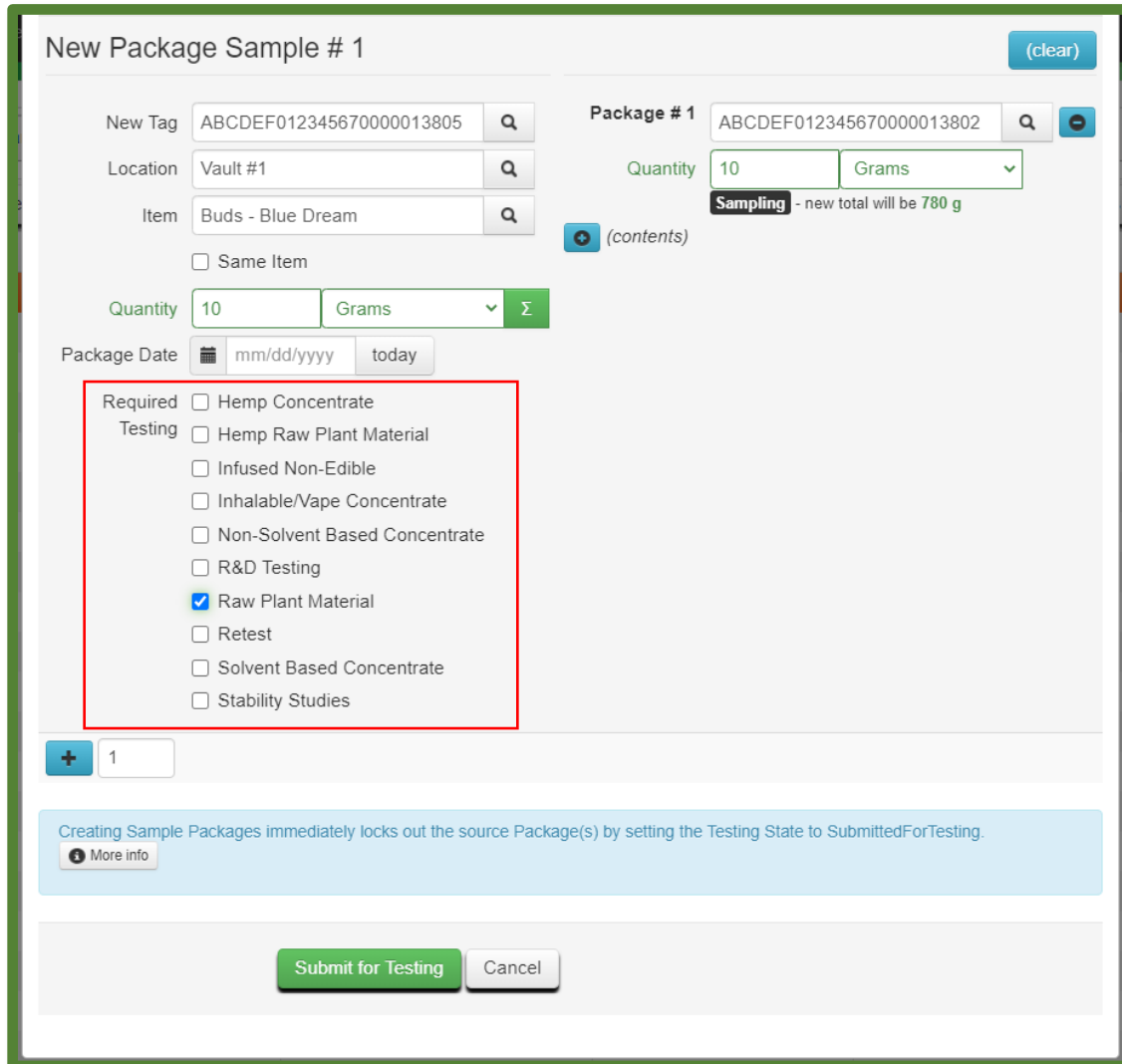
Figure 5: Select Package for Test Sample

Once selected, an action window will launch. In the action window, indicate the new tag number, location, name of the item, the quantity, and the package date. The new step added to the process already in use is the selection of the "Required Testing" Test Batch. In this step,

check the box that matches the type of item of the sample, and this will indicate to the Testing Facility which Test Types are required for the test sample. In **Figure 6**, it is shown that for the "Buds-Blue Dream" test sample, the test batch of "Raw Plant Material" was selected.

Figure 6: Select Required Test for Package Based on Item Type

New Feature: Plant Batch Enhancements

Immature plant batches are not able to be "split" after creation, as seen in **Figures 7 and 8**. This process can be used in a case of moving part of an immature plant batch to another location. *Please note that there is no way to undo this action nor the ability to merge different plant batches.*
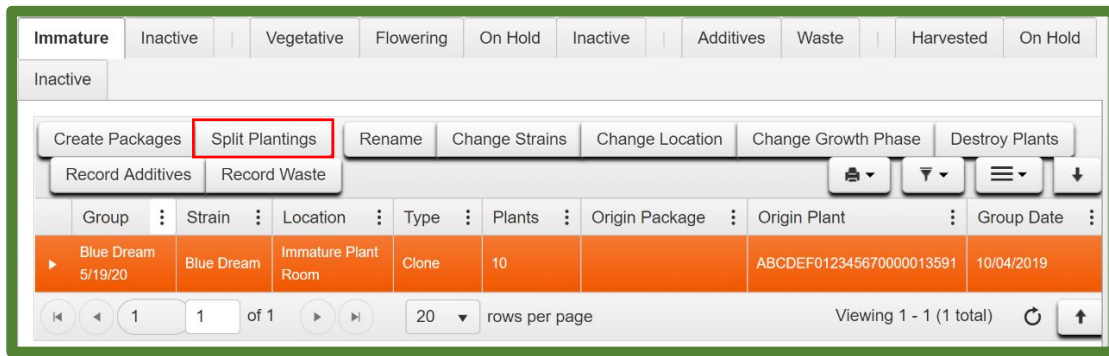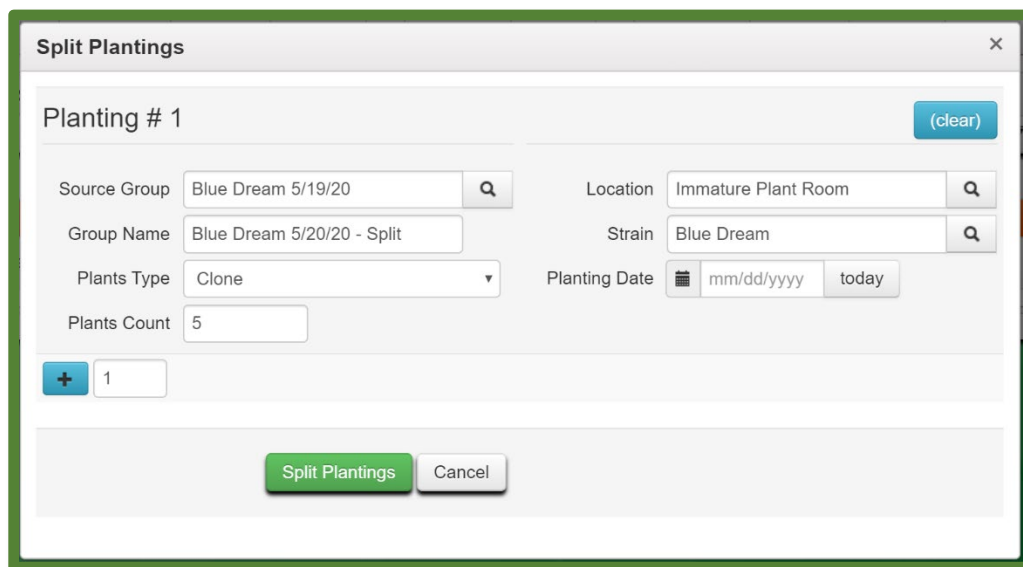

Figure 7: Select the Immature Plant Batch to Split

Once the Split Plantings is selected, an action window opens where they will complete the information about the new planting, including Plants Count, Group Name, Strain, Location, and Planting Date. Once this information is completed, then select the "Split Plantings" Button.

Figure 8: Split Plantings Action Window

New Feature: "Packaged By" Field in All Package Popovers

A popover grid is displayed by hovering the mouse over the 🔍 symbol anywhere in Metrc. In addition to all of the package and item information, newly added is a "Packaged By" field that will display the facility license number that created the package shown in **Figure 9**.
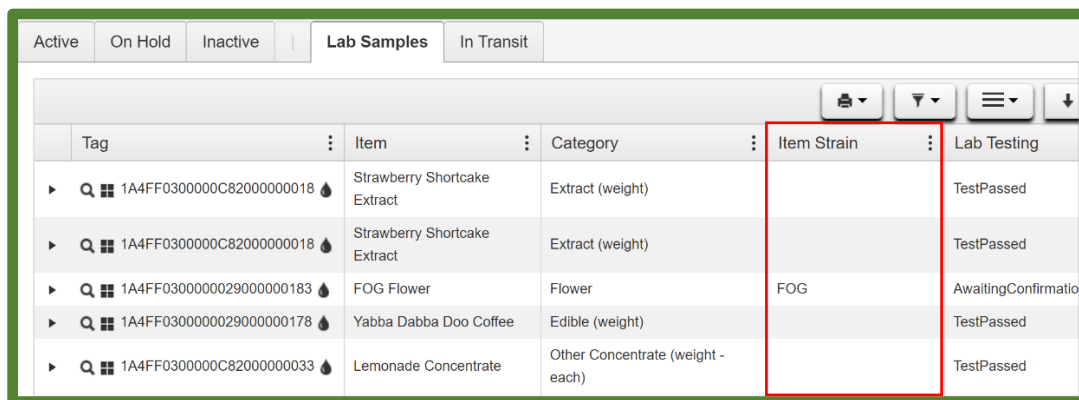

Figure 9: Package Popover Menu

New Feature: Lab Results "Item Strain" Field

Users within Testing Facilities who have the View Packages permission have access to a new Lab Samples tab on the Packages page. Newly added to the Lab Samples grid is the "Item Strain" column, which will populate with the Strain of the item, if applicable as seen in **Figure 10**.

Figure 10: Lab Samples Grid "Item Strain" Field

New Feature: Editing and Recording Sales from Finished Packages

With this new update, recording or editing sales receipts and deliveries from a finished package will no longer be able to be done. Attempting to do so will result in the error message, as seen in **Figure 11.**

Contents from Package 1A4FF0300000026000000388 cannot be sold because it has been Finished.

Figure 11: Finished Package Sale Error

Unfinishing Packages

To unfinish a package, navigate to the Inactive tab on the Packages grid and select the package finished package with which the action is to be performed in the sales action. Once selected, use the "Unfinish" button as seen in **Figure 12** and confirm the package being unfinished is in the action window that follows.

Tag	Src. H's	Src. Pkg's	Location	Patient	Item
ABCDEF012345670000014601			Storage Room		BHO Oil Cartridge 1 g

Figure 12: Unfinish Package

Once the package is unfinished, then make any sales actions required. *Please note that if the sales actions are performed that results in a non-zero amount, the package will not be able to be finished.*

Updated CSV Formatting Guide

Metrc Support has updated the CSV Formatting Guide, which can be found under the support tab on the top navigational bar, as seen in **Figure 13.**

Figure 13: CSV Formatting Guide

Please feel free to contact Support at support@metrc.com or 877-566-6506 with any questions.