Setting up and using METRC (Cannabis Tracking System) For Hemp Certificate Holders



Training Opportunities and Resources



METRC Training and Resources

- There are multiple trainings available to familiarize yourself with METRC tracking requirements and how the system works:
 - METRC webinars are available on METRC's website: <u>https://www.metrc.com/oregon</u>
 - METRC "on demand" videos are available on METRC's YouTube page: <u>https://www.youtube.com/channel/UCcasu4orIpyqqEmQWWOkW0w</u>
- The OLCC has also built a Metrc Wiki website which will provide information to OLCC Licensees, included Hemp Certificate Holders, on how to operate within Metrc:
- The OLCC has a [product categorization guide] that can help you classify your hemp items in the Metrc system.
- The OLCC has created a [process flow] outlining the points of entry hemp items have to enter into the Metrc tracking system.

Go to https://www.metrc.com/oregon

Click on "Schedule Training Now"



Oregon Program Information

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

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

Franwell Metrc is responsible for the technical and operational components of the CTS; the OLCC is responsible for CTS statutory and regulatory issues.

Franwell provides licensees with training sessions and webinars to provide a thorough understanding of the CTS. Prospective licensees will be required to pass a test on their knowledge of the CTS before the OLCC issues their license.

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

Steve Marks Executive Director, OLCC	Validated Integrators	Schedule Training Now	Training Videos
	Metrc Oregon		





Advanced New Business OMMP 4 Feb 2019 Su Mo Tu We Th Fr Sa 1 4 6 8 9 14 21 18 28 24 7 4 6 8 9

Select the date you wish to take your new business training. Available dates are clickable, unavailable dates will be grayed out. You must sign up at least 48 hours before the training is scheduled to begin

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

	OR New Business Metrc System Training	×
Under "License		
Type" select	License Type	
"Producer" if you	Commun Name	
are a Hemp	Company Name	
Grower and	Email	
"Processor" if you		
are a Hemp	First Name	
Handler. At the	Last Name	
bottom under		
"Application	Phone	
Number" input		
your ODA License	Application Number	
Number		
		Complete

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



Dear

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

How To Join The Webinar

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

Add to Calendar: Outlook® Calendar | Google Calendar™ | iCal®

Click and join at the specified time and date:

Join Webinar

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

To Cancel this Registration

If you can't attend this webinar, you may cancel your registration at any time.

Getting Set Up in Metrc



First Time Access to METRC

- Once your certificate has been approved by the commission and the certificate fee has been paid you will need to contact Metrc Support to receive your credentials into Metrc.
- Metrc support can be reached at 1-877-566-6506. The facility's industry admin will need to reach out to Metrc to obtain your credentials. Metrc will not contact anyone at your hemp facility.
- Once credentialed into Metrc the industry admin will receive an email similar to the email pictured here. Click the first time log-in link to get started.

Welcome to Metrc®!
Your username:
Log-in and set your password here:

First Time log-in key: Your e-mail: Log-in key and link expire

First Time Access to METRC

- If you do not click the link in the email before it expires (within 24 hours) you can activate your account by:
 - Contacting METRC support (<u>support@metrc.com</u> or calling 877-566-6506); they are able to send a new email with a new activation link.
 - Navigating to <u>https://or.metrc.com/password/reset</u> and entering the username and email provided by the industry admin to Metrc Support.



Initial Account Set Up

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

		Contac	ct Info.	Secu	rity Info.		
		Full Name		Username Password			
 Click Save 		Phone Number		Confirm Password			
Profile	Security Question			Accou	Int Recovery		
when	Security Answer	Answer					
Finished.							7
			Save P	rofile Undo Changes			

Initial Account Set Up, cont'd

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

Packages

Smetrc 🛛

Packages

Your "Facility License Number" can be seen in the top-right of the screen; this is also how you choose which Metrc facility to access if your user account has access to more than one

OR Larger Rec-WHSLR 1 | 060-X0001

Anytime you call the Metrc support desk you will be asked for this Facility License Number

Admin Set Up

- ► There are several steps in making sure that once your account is set up, that you are ready to use the METRC system completely. Each "facility" in Metrc is an individual hemp grower or handler certificate.
- ► For each Facility:
 - Order RFID Package Tags
 - Add:
 - Employees (anyone who will have access to Metrc)
 - ▶ Items
 - ▶ Repeat as necessary for each facility

What is an RFID Tag?

- An RFID package Tag is a tag that is used to track packages of items through the Seed-to-Sale tracking system.
- Package tags are used to transfer packages to other facilities and helps trace the chain of custody of items through the system
- The package tag is perforated with the "Package ID #" printed on the upper and lower sections. (Example: can be used for jar labeling in order to identify associated package)



- To order tags, Select "Admin" from the top menu.
 - A drop down menu will appear with several options.
 - Select "Tag Orders" from the drop down menu

Smetrc 💱	•	Packages	Transfers -	Reports -	Admin -
Dacka	dee				Tag Orders
racha	yes				Tags
Active	On Hold	Inactive			Strains Items
					Employees

Select the "New Tag Order" button on the left of the screen

Current History			
New Tag Order		1	
Order Number	:	Order Date	



- ▶ Fill in the information requested.
 - For Hemp Facilities the tags you order_ will be "Hemp Package" tags.
 - Order the number of tags you will need for your packages.
 - Select your payment method and fill in the information requested.
 - Once completed click the "Place Order" button to place the order.

Order Details					
Facility License OR LAR	GER THAN SALES, LLC Cannabis Pack	cage Count 💽 - (\$0.25 ea., 5,00	10 max.) \$0.00		
Physical Address 9079 SE Portland	McLoughlin Blvd. Subtotal OR 97222-7355		\$0.00		
Shipping Details					
Contact Name	Joshua Fisher	Chinologillandling			
Phone No.	+1-800-420-MAIN	Taxes			
Copy from	Facility 🗸	Total Amount			
Ship Address *					
Address Cont.					
City					
State + Zip	AL 🗸				
	P.O. Boxes				
Reymont methods					
Payment metrious					
O Credit card 🚾 VISA					
O Check or Money Order					
Please note: You MUST place separate Tao Orde	rs for each Facility. Plant and Package Tags are p	roorammed for each of your Facilities individually			
and are placed within your Metro and Make sure that you are in the corre	ccount automatically once received. ct Facility within Metrc when you place the order.				
Tag Orders are not transferrab	le between Facilities.				
All Tag Orders are final, so we	recommend that you place your orders care	fully.			
P	lace Order Cancel				
_					
	Place Ord	er Cancel			
	T lace Olu	Gunder		//	

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

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

Add Employees

- Each facility administrator may add other users into the METRC system with defined levels of access.
 - "Employees" include anybody who is working in the facility. Trimmers, Growers, cooks, etc.
 - Any user can be given permission to view and/or enter data in METRC
 - The facility administrator is responsible for the accuracy of the information input into Metrc.
- To Add an Employee first go to the "Admin tab" and select "Employees"



Add Employees

- There are two types of employees that can be added to your facility: Licensed Employees and Unlicensed Employees
 - Licensed Employees are employees that hold an OLCC issued worker permit.
 - Unlicensed Employees are employees that do not have an OLCC issued worker permit.
 - ODA Hemp Certificate employees are not required to have an OLCC worker permit but may be entered as licensed employees if they have a worker permit.
- Click on the button that corresponds to the type of employee you want to add to your facility.

💱 metrc 🖂 - Pack	ages Transfers 🛛 🕶 Rep	orts 🖃 🔹 Admin 🔹		
Employees		7 /		
Add Licensed Employees	Add Unlicensed Employees	Edit Employees	Lock Unlock	

Adding a Licensed Employee



Adding an Unlicensed Employee

First Name Last Name Birthday	MMDDYY	Per	rmissions	Packages Page Grids (reg'd) Inventory Create/Submit/ <u>Disc.</u>	☐ View ☐ Manage ☐ Manage	0 NOSTREET PORTLAND OR MULTNOMAH 97232 220-32 OR Larger Rec-WHSLR 1 060-30001 OR Lofty Rec-Producer A 020-30001 OR Lofty Rec-Producer B 020-30002	555
MMDDYY E-mail	Enable online access to	this Facility		Transfers Menu Licensed & External Templates Hub	□ Manage □ Manage □ Manage	OR Lofty Rec-Store 52 050-X0001 OR Mishmash Rec-MFG X 030-X0001 OR Perceptive Labs 010-X0001	
'hone Number Home	+1-123-456-7890 - Select Home -	~		Financials Menu All Reports Menu	🗌 Manage	Check all Check none	
Employment	Owner at this Facility Manager at this Facility Checks/Verifies custome Compliance Officer or S Data entry/Records inve Directly handles marijua None of the above	er identification iecurity entory in Metrc ana items		All Admin Menu Tag Orders Tags Strains Items Employees	☐ View ☐ Manage ☐ Manage ☐ Manage ☐ Manage ☐ Manage		

If online access is granted:

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

Create Employees

To Add an Unlicensed Employee first input their Name and Date of birth

Then add their email, phone number, and employment type

You can then specify their permissions that they can have access to in the system

Once the information is input correctly, click on "Create Employees"

Add Employees

► This form will appear:

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

Add Employee	95				
Employee #	ŧ 1				(cle
First Name Last Name Birthday MMDDYY E-mail Phone Number Home		Permissions	Plants Page Immature Plants Grids (rggd) Inventory Destroy Vep/Flower Plants Grids (rggd) Inventory Destroy Destroy Additives	View Manage Manage View Manage Manage Manage	OR Larger Rec-WHSLR 1 060-X0 OR Lofty Rec-Producer A 020-X0 OR Lofty Rec-Producer B 020-X0 OR Lofty Rec-Store 52 050-X0001 OR Lofty Rec-Store 56 050-X0002 OR Mishmash Rec-MFG X 030-X OR Perceptive Labs 010-X0001 Check at Check none
Employment	Owner at this Facility Manager at this Facility		All Waste All Harvests Grids (rgg(d) Inventory Einist)/Discontinue	View Manage View Manage View Manage Manage	
			Packages Page Grids (reg(d) Inventory Create/Submit/Disc. Transfers Menu Licensed & External Templates	 View Manage Manage Manage Manage 	-
			Financials Menu All Reports Menu	Manage	
			All Admin Menu Tan Orders	View Manage	
			Tags Rooms Strains	Manage Manage Manage Manage	

Add Employees

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

d Employees	×	
mployee # 1	(clear)	
First Name Last Name Birthday MMDDYY MMDDYY Enable online access to this Facility Employment Owner at this Facility Manager at this Facility	 OR Larger Rec-WHSLR 1 060-X0001 OR Lofty Rec-Producer A 020-X0001 OR Lofty Rec-Producer B 020-X0002 OR Lofty Rec-Store 52 050-X0001 OR Lofty Rec-Store 56 050-X0002 OR Mishmash Rec-MFG X 030-X0001 OR Perceptive Labs 010-X0001 Check nune 	
ease note: I new employees granted online access via the "Enable online access via the "Enable online access via the "Enable online access is granted: ince logged in, the User will need to update their security setting k expiration date/time, and the Metrc web address.	access to this Facility" checbox above will nto their User Profile. s. The e-mail will contain the User's Username,	
Create Employees Cance	1	

Add Items

- To add an item click the "Admin" Tab and select "Items" from the list
- In the top left corner select the "add item" button to create a new item.
- Items are separated by category: Industrial Hemp, Industrial Hemp Concentrate, etc.
 - You can name your items whatever you want, but they must be categorized as one of these item types.
 - OLCC's "Product Categorization Guide" (available here) explains the various item categories.



Add Items

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

Items	×
m # 1	(clear)
Name	Unit of Measure
Category - Select -	
ertain Item Categories require the selection of a pre-existing St all of the selected Facilities would be convoluted and complex or create Items in multiple Facilities at the same time.	train. Verifying and informing that the specified Strain exists to inform. For this reason we have opted to not add the ability
Create Items Cancel	

Creating Hemp Inventory in METRC

- Inventory that is earmarked by the ODA Grower or Handler for the OLCC Recreational Marijuana Market must be brought into Metrc using an external transfer.
- Click on "Transfers" and select "External"
- ▶ Then create a New Transfer

xternal Tra	Licensed Templates					
View Manifest		-				
Incoming Outgoing]					
New Transfer Manifest	: Origin	: Туре	Transporter	Briver	Vehicle	
				No	data is a	
R Pag	ge 0 of 0	N 20	✓ rows per page			

Creating Initial Inventory in METRC (for Hemp Growers and Handlers)

- Hemp Growers: Select "Hemp" as the transfer type. Input your ODA Grower/Handler number and fill in the other information requested.
- Complete one New Incoming External Transfer for your start up inventory and for each additional transfer in from your ODA Hemp Grow Site.
 - Press the Plus button to add additional items
- Click on Register Transfer to record entries
 - Note: Clicking "Register Transfer" does not create tagged packages in your inventory; you must complete the External transfer to fully reconcile your inventory

New Incoming] Transfer			×	1
Туре	Нетр	~			
ODA Grower/Handler ID	1234567				
Origin Name	1234567				
Phone No.	555555555				
Transporter	060-X0001	٩			
OLCC Regulate	ory Purposes (OLCC Regulatory I	~	OLCC Regulate	ory Purposes OLCC Regulatory F 🔽	
Employee ID	OLCC Regulatory Purposes		Vehicle Make	OLCC Regulatory Purposes	
Driver's Name	OLCC Regulatory Purposes		Vehicle Model	OLCC Regulatory Purposes	
Driver's <u>Lic.</u> No.	OLCC Regulatory Purposes		License Plate	OLCC Regulatory Purposes	
Phone No.	503-502-5555	(use default)			
Planne	d Route n/a		Est. Departure	■ 02/22/2019 today 01:55 PM ■ 02/22/2019 today	
	Package # 1 Hemp Quantity 1000 🐑 ((package)	arams v	Package Date	01:55 PM ▼ ▼ ■ 02/22/2019 today	
	Register Transfer	Cancel			

Completing External Transfer

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

ernal	Tran	sfers											OR Larger	Rec-WHS	LR 1 060-X0001
			ار کلیے										1		Oregon Demo
Manifest															
_															-
oming	outgoing														
New Transfe														é.	E.
Manifest	4	Origin	Туре	:	Transporter	Driver	Vehicle Info	Pkg's	ETD	ATD	: ETA	: ATA	Received	1	
00000228	10	1234587	Hemp			OLCC Regulatory Purposes	Make: OLCC Regulatory Purposes Model: OLCC Regulatory Purposes	1	02/22/2019 01:55 pm		02/22/2019 01:55 pm				Edit Complete

Completing External Transfer

- The quantities entered from creating the new transfer will be auto-populated
- Confirm the accuracy of the quantities and assign a unique RFID tag to each item by clicking the magnifying lens button and selecting a tag from the list
- Once the information is accurate and complete, clicking the "Complete Transfer" button will create the packages with the specified quantities in your inventory

Manifest	0000022801	Transfer Type	Нетр					
Origin Lic. No.	1234567	Origin Name	1234567					
Main Phone <u>No.</u>	555555555	Mobile Phone No.						
Transporter Lic. No.	060-X0001	Transporter Name	OR LARGER THAN SALES, LLC					
Employee ID	OLCC Regulatory Purposes	Vehicle Make	OLCC Regulatory Purposes					l
Driver's Name	OLCC Regulatory Purposes	Vehicle Model	OLCC Regulatory Purposes					
Driver's Lic. No.	OLCC Regulatory Purposes	License Plate	OLCC Regulatory Purposes					
Phone No. for Questions	503-502-5555							
Package # 1	ABCDEF012345670000015179 Q	Item Hemp	Shipped Qt	1000 😫	g	Reject		
			Receive Of	v 1000 \≜	Grams	v	1 🗾	

Transfers to other OLCC licensees

- Once the product is brought into the OLCC system it can then be processed, tested and/or transferred to an OLCC licensed facility.
- Prior to transfers to an OLCC licensee the hemp product must have passed all required compliance tests. This testing must occur <u>after</u> the hemp product has been created in Metrc. <u>The sampling and</u> <u>all test results must be recorded in</u> <u>Metrc.</u>
- To transfer to an OLCC Licensee first select the "Transfers" tab and click on "Licensed"
- Click on the "New Transfer" button



Transfers to other OLCC licensees

- When you click on "New Transfer" a pop up window titled "New Licensed Transfer" will appear.
- First, select the transfer type.
 - There are two types of transfers in Metrc:
 - Transfer refers to transfers of product that are not associated with the sale of the product, but just passing the product from one license to another. For example, a vertically integrated business structure may transfer product between license types, but no money changes hands between those licensees.
 - ▶ Wholesale transfer refers to transfers where a price/sale is associated with the transfer to the receiving licensee. For example, Hemp Handler A would transfer to Retailer B and charge a price of \$1,000 for the package.

Est. Departure 📋 02/19/2019	today
	1
EST Arrival	today
02 · 08 PM	1
Type part of Package number Q (clear)	
Dogistor Transfor Cancel	
Type part of Package number Q (clear)	

Transfers to other OLCC licensees

- Once the transfer type is selected, additional fields will appear asking for employee and vehicle information. Fill these fields in.
 - You can select the destination by typing in the license number or clicking the search icon to search for an OLCC licensed facility.
 - Make sure to include precise driving instructions from your facility to the receiving facility
- Once you confirm the information is correct, add the packages you want to transfer by typing in the package number from your inventory or clicking the search icon to select a package from your list of active packages.
 - If the transfer is a Wholesale Transfer, you must enter a price.
 - To add additional packages to the manifest, click on the black plus button
- Once the information is confirmed to be correct, click on the "Register Transfer" Button

	020-X0001		ų			
- Lookup -		~		- Lookup -		
Employee ID				Vehicle Make		
Driver's Name				Vehicle Model		
Driver's <u>Lic.</u> No.				License Plate		
Phone No.	+1-123-456-7890) (use default)			
Destir	nation 1 Type pa	rt of the License Nu	ımber. Q	(clear) Type	Wholesale	
Planne	d Route			Est. Departure	a 02/19/2019 today	
					<u> </u>	
					01 : 40 PM	
					* *	
				Est. Arrival	iii 02/19/2019 today	
					01 · 40 PM	
					v v	
	Package # 1					
	-	ype part of Package	e number	(clear)		
	Whsle, Price	ĸ. 100.23 €				
	€ (package)					
(des	stination)					

Contact Information

- Oregon Department of Agriculture
 - ▶ Hemp questions related to licensure and non-OLCC Market questions
 - ▶ (503) 986-4652
 - ▶ Industrial-hemp@oda.state.or.us
 - https://www.oregon.gov/oda/programs/nurserychristmastree/pages/hemp.aspx
- Oregon Liquor Control Commission
 - ▶ For questions related to OLCC's Hemp Rules, recreational market sales, and OLCC certification
 - ► <u>OlCC.Hemp@Oregon.gov</u>
 - ▶ (503)872-5000
 - ▶ For questions related to CTS tracking compliance:
 - Marijuana.CTS@Oregon.gov
 - ▶ (503)872-5190
- Metrc support desk
 - Can help with questions about specific Metrc functionality ("how do I create a transfer in Metrc?")
 - ► <u>support@metrc.com</u>
 - ▶ (877) 566-6506