Maine's Getting Started Guide: Inventory Tracking System

Maine Adult Use Cannabis Program (AUCP)

May 2022

Contents

Overview

The Maine Office of Cannabis Policy (OCP) has contracted with the Florida-based Metrc LLC to provide Track-and-Trace services to the State of Maine. The Metrc system will serve as the State's Inventory Tracking System, which all adult use cannabis establishments will be required to use as outlined in 18-691 C.M.R. ch. 1 – Adult Use Marijuana Program. All inventory tracking activities at a cannabis establishment licensee must be tracked through use of the inventory tracking system. A licensee must reconcile all on-premise and in-transit cannabis, cannabis concentrates and cannabis product inventories each day in the inventory tracking system by 11:59 p.m. that same day.

Note: This "Getting Started" guide is only intended to cover the initial tasks a new licensee will need to perform in Metrc. It is not meant to be a substitute for more extensive training and/or system documentation made available from Metrc.

Contact Information

Customer Support:
- http://support.metrc.com
- support@metrc.com
- 1-877-566-6506

Contact Us:
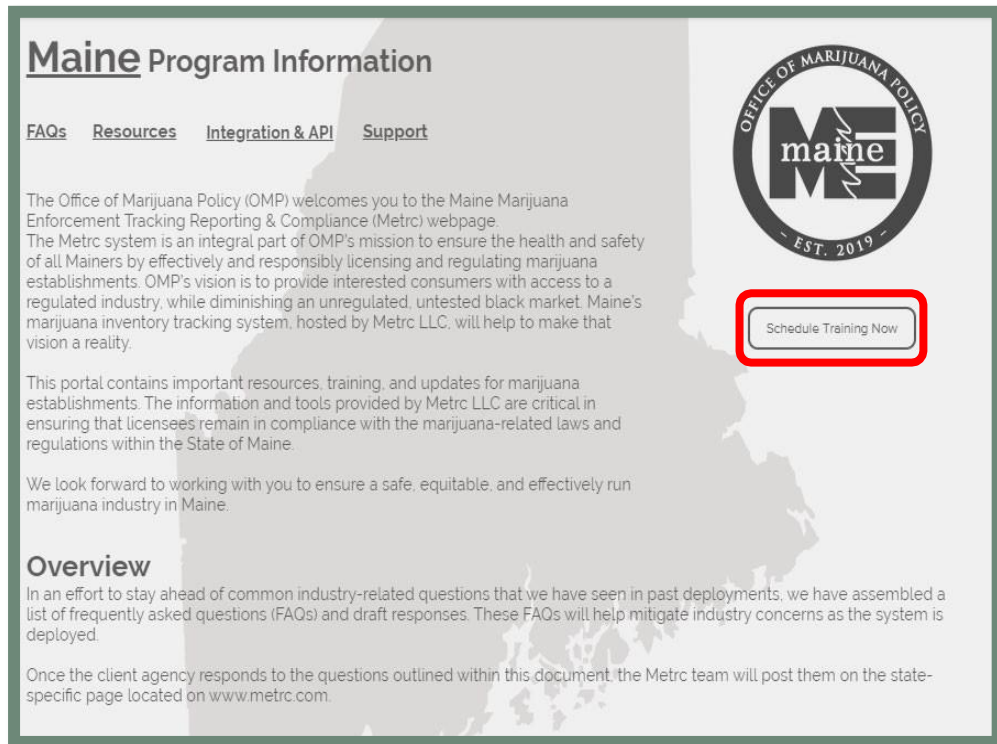- https://www.maine.gov/dafs/ocp/resources/guidance-documents
- 1-207-287-3282

Required Metrc Training

Once a prospective licensee has their conditional license number and has received communication from OCP to do so, that cannabis facility's Track-and-Trace administrator and fellow employees will be eligible to sign-up for the new business training course.

Each facility is required to have a Track-and-Trace administrator in the Metrc system, who must be identified during the licensing process in order to complete Metrc credentialing. The Track-and-Trace administrator is required to take the new business training course and pass a comprehension test following its completion.

It is recommended that any employee planning to operate in the Metrc system take the new business training course to ensure they know how to accurately utilize the system.

The new business training course is provided in a webinar-based format to individual licensees or a small group of licensees.

- These webinar-based training classes will be offered **Tuesdays at 1:00PM, Wednesdays at 9:00AM, and Fridays at 10:00AM**. The classes are instructor led and provide a thorough overview of the core functionality of the Metrc system.
- Advanced training classes—by license type—will also be made available in the future.
- These classes will be available to any individual with a valid OCP-issued Individual Identification Card (IIC) and association with a conditional license and these individuals can sign up by selecting the "Schedule Training Signup" button at www.metrc.com/maine.

To sign-up for the new business training course, the following information **MUST** be provided:

- Establishment license number
- Business Name
- IIC Number
- Email
- First Name
- Last Name
- Phone Number

First-Time Metrc Credentialing

For any **new** adult use cannabis facility licensee, please follow the steps below to gain access to the Metrc system for the first time.

The Track-and-Trace administrator completes the new business training course, passes the subsequent comprehension test and receives written authorization from OCP to request Metrc log-in credentials. The Track-and-Trace administrator must then send an email to support@metrc.com requesting login credentials. The email **MUST** contain the following:

> Subject Line: "Requesting ME Credentials"
>
> In the body of the email, please include:
>
> - Your full name
> - Your Individual Identification Card (IIC) Number
> - Your business License Number
> - The name of your business and DBA if applicable
> - The best phone number to reach you
> - The email address where you'd like your "Welcome to Metrc" email to be sent (**please note:** your employer may require this to be a specific address)
> - Official notice from the OCP that they have been given permission to receive Metrc credentials

Your information will be vetted within 48 hours, or by Monday if you've sent the information on Friday. You will then receive a "Welcome to Metrc" email (see following image). This email contains your login link and a temporary password to access Metrc and set up your account.

Please note: The first-time login key is good for 24 hours; you must login within 24 hours of when the link was sent!

Logging into Metrc

Item 1: Login Link

https://ME.metrc.com/log-in/first-time
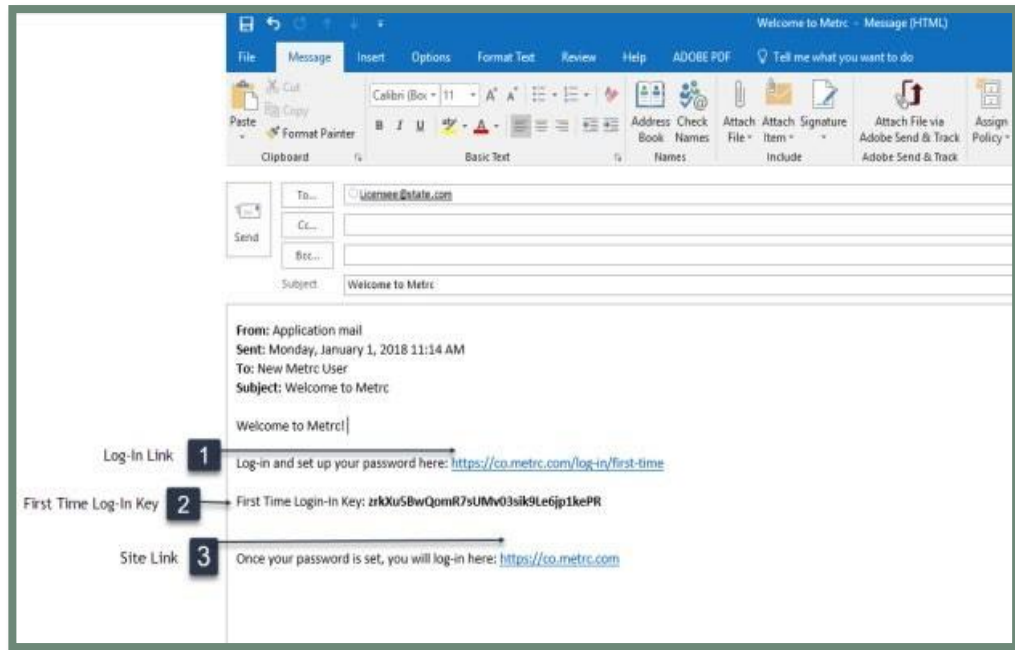
This link will take you to the first-time login page where you can use your key and temporary password to login.

Item 2: First Time Login Key

This first-time login key can only be used once, and within 24 hours of when the "Welcome to Metrc" email is sent.

Item 3: Site Link

https://ME.metrc.com

Use this link to navigate to the main login screen and create a bookmark on your device.

The first credentialing request must come from the Track-and-Trace administrator identified during the licensing process. The Track-and-Trace administrator can be changed at a later date, if needed.

Creating User Profile

Once you click on the green "Log In" button from the first-time log in screen, you will be directed to the User Agreement as well as your User Profile to complete your contact and security information.

Item 1: Full Name

Your full name is prepopulated from the State of Maine's database. If a typographical error has been made, please contact the Office of Cannabis Policy at (207) 287-3282.

Item 2: Email

You will enter and can change your email in this section.

Item 3: Phone Number

You will enter and can change your phone number in this section.

Item 4: Username

Your username will be prepopulated by the State.

Item 5: Password

You will enter and can change your password in this section. Your password **MUST** contain at least:

1 upper case letter, 1 lower case letter, 1 number, and 1 special character.

Item 6: Confirm Password

Confirm your chosen password by retyping it in this section.

Item 7: Security Question

Enter a security question to use when resetting your password in the event you forget it and are unable to log in to the system.

Item 8: Security Answer

Enter the answer to your chosen security question.

Item 9: Save Profile button

Use this button to save all entered information or changes to information.

Item 10: Undo Changes button

This button will clear the fields you populate so that you can begin again if there were errors.

Once you have completed the information and hit the **Save Profile** button, you will have successfully created the login credentials you will use to access the system. **Do not share these credentials with anyone.**

Adding Employees

The Employees functionality is available under the Admin tab on the navigation bar.

Item 1: Employee License Number

Enter the employee's IIC number. The system will associate all actions performed by a user with their IIC number.

Item 2: Enable Online Access checkbox

Use this checkbox to designate whether the employee being added will, or will not, have access to the organization's Metrc account. While all employees must be entered in the "Employees" list in Metrc, not all employees have to be given access.

Item 3: Email

Enter the employee's individual email address. This is where the employee's "Welcome to Metrc" email will be sent.

Item 4: Home

The "Home" screen selected for the employee will be that user's default screen in Metrc. The "Home" screen does not affect the employee's ability to move from screen to screen but does need to match the Permissions granted to the employee.

Item 5: Employment

This area may be used to designate the job functions of the individual being added, such as Owner or Manager. This designation does not automatically populate certain Permissions; the Administrator will still need to designate Permissions for each specific user.

Item 6: Permissions

Select the checkbox for each function an employee will need to access to complete their job tasks. This area will not be visible if you are adding an employee who will not have access to the system. The options available in this section vary by facility type. Owners are encouraged to be highly selective about which permissions they grant employees.

Item 7: Facilities

If an employee is being added who will have access to multiple facilities for an organization with more than one license, they may be added to those facilities at the same time. Keep in mind, however, that if the same employee needs different permissions at different facilities, the Administrator will need to add or edit that employee in each individual facility.

Item 8: Add button

Allows you to enter multiple employees at the same time.

Item 9: Create & Save Employees button

Click here to save your work and add the employee to the facility.

Item 10: Cancel button

Click here to exit the screen without saving any data.

Item 11: Clear button

Click here to clear all the information fields without saving.

Note: The Permissions that you select for an employee will affect the functionality available to them on the navigation bar and within each functional area.

As specified in the First-time Credentialing section of this guide, the login link contained in the "Welcome to Metrc" email expires 24 hours after the link is sent. If an employee fails to login within the 24-hour period, the Metrc Administrator will need to return to the Employees menu, select that employee, and click the "Resend Welcome Email" box.

Ordering Tags

After being credentialed into Metrc, the first thing you should do is order RFID tags. Tags are printed in Florida and shipped via UPS with a standard shipping time of 5-7 days. Please keep this in mind as you are required to have a sufficient stock of tags on hand and need them to enter your beginning inventory. To order tags, log into your Metrc account and click Tag Orders under the Admin tab.
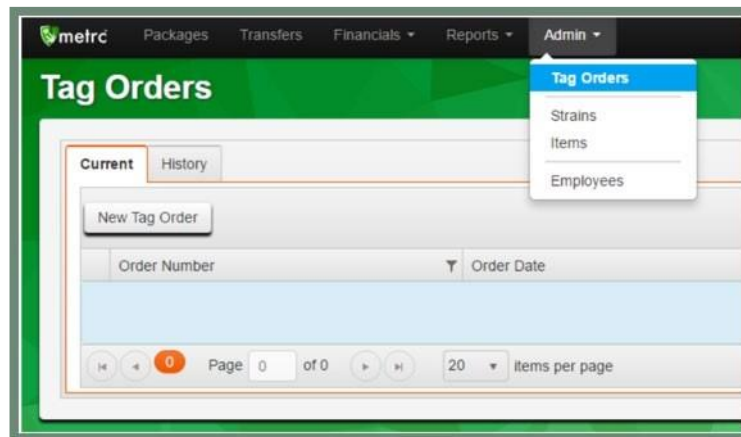
Once your tags arrive, navigate back into the Tag Orders area to select the "Receive" button to the far right to populate your tags in the system. This button will only appear once your order has shipped. DO NOT receive your tags digitally before they physically arrive.

Adding Locations

The Locations area is located under the Admin functionality on the navigation bar. This is where locations can be added or edited as needed. The "x" button to the far right of the location name can be used to discontinue the location for that facility. OCP has "Indoor Grow" and "Outdoor Grow" location types to be used by Cultivators, and "Default" to be used for all other license types.

Locations should be added for immature batches, plants, harvests, and packages.

Item 1: Location Name

The location name is entered here.

Item 2: Location Type

Use this dropdown to select which area of the system this location should be used.

Item 3: Add Button

This button is used to add multiple locations to the same facility or facilities. Use the field to the right of the plus button to input the number of additional locations to be added.

Item 4: Clear Button

This button is used to clear all entered data without saving.

Item 5: Facilities

The facility that you are logged into will automatically be checked. Any additional facilities can be checked as well to add the location to all facilities at once. The "Check All" and "Check None" buttons can be used to quickly select all or none of the additional facilities.

Item 6: Create Locations

Use this button to save the changes and create the location.

Item 7: Cancel

Use this button to cancel and exit without saving any data.

Adding Strains

The Strains area is located under the Admin functionality on the navigation bar. This is where strains can be added or edited as needed. The "x" button to the far right of the strain name can be used to discontinue the strain for that facility. If the "Used" column has a "Yes" for that strain, the strain cannot be edited.

Item 1: Strain Name

Enter each strain you grow and/or carry at your facility.

Item 2: Testing Status

An optional field in which you can define whether the product has been tested, and if so, if testing was performed in-house or by a third party.

Item 3: THC and CBD Content

An optional field in which you can identify the THC and CBD content of the Strain.

Item 4: Indica vs. Sativa

An optional field in which you can identify the Indica vs Sativa makeup of the Strain.

Item 5: Add More Strains

Select this button to add multiple strains at once on this screen. Use the number field next to the blue plus sign to input the number of additional strains to be added

Item 6: Create Strains button

Select this button to save the information and create the strain(s).

Item 7: Cancel button

Select this button to exit the screen without saving any information.

Item 8: Additional Facilities

If your organization has multiple facilities, you can add strains to one or more at the same time using the relevant checkmark boxes. Use the "Check All" or "Check None" boxes to select all or none of the facilities, as needed.

Item 9: Clear Button

Use this button to clear all data without saving.

Adding Items

The Items area is located under the Admin functionality on the navigation bar. This is where items can be added or edited, as needed. The "x" button to the far right of the item name can be used to discontinue the item for that facility. If the "Used" column has a "Yes" for that item, the item cannot be edited.

When adding Items into Metrc, please keep in mind:

- The "Item" name should identify the product that will be packaged and distributed to Consumers.

- The Item name should not simply identify the Category; it should describe the specific item that is being packaged. The name for an item from any Strain Specific category should include the Strain Name (i.e. Buds - Blue Dream). The item names should not include the potency content of the item.

- Items must be created for each individual facility.

- As you create your Item, you will also identify the Category it belongs to. Categories available in the dropdown menu are populated by the State. Categories facilitate the tracking of product in the system by like groups.

- The facility packaging the product is responsible for naming the Item; the Item name is carried with the product through the distribution chain.

- Once Items are created, they will be available in the Items dropdown menu in the packages screen.

Item Categories are defined by the State and are listed below with additional requirements:
    Note: Please keep in mind that the State may change, add, or remove Item categories.

- **Buds/Flower** – Weight-based, strain required
- **Capsule** – Count-based
- **Concentrate (each)** – Count-based
- **Concentrate (weight)** – Weight-based
- **Drink** – Count-based
- **Edible (Liquid/Tincture)** – Count-based
- **Edible (Solid)** – Count-based
- **Immature Plants (Seedling)** – Count-based, strain required

- **Infused Non-Edibles** – Count-based
- **Infused Pre-Roll** – Weight-based
- **Kief** – Weight-based
- **Mature Plants (Each)** – Count-based, strain required
- **Raw Pre-Rolls** – Weight-based
- **Seeds** – Count-based, strain required
- **Shake/Trim** – Weight-based
- **Shake/Trim (by strain)** – Weight-based, strain required
- **Suppository** – Count-based
- **Topical** – Count-based
- **Vape Product** – Count-based
- **Vegetative Plants (Immature)** – count-based, strain required
- **Wet flower** - Weight-based, strain required
- **Wet Trim** - Weight-based, strain required

Adding Items

Item 1: Name

Type the Item Name, keeping in mind the naming requirements identified in the Categories discussion on the previous page and under Category below.

Item 2: Category

Select the correct Category for the Item from the State-populated dropdown menu, keeping in mind the additional requirement guidelines discussed on the previous page. Certain Category selections may populate more data fields underneath Unit of Measure for you to complete.

Item 3: Unit of Measure

If an Item belongs to a weight-based Category, select the Unit of Measure for that Item. If the Item belongs to a count-based "each" Category, select "Each". Please ensure you've selected the correct Unit of Measure before creating the Item.

Item 4: Clear button

Select this button to clear all entered data without saving.

Item 5: Add button

Select this button to create additional items while on this screen.

Item 6: Create Item button

Select this button to save all entered data and create the Item in the system.

Item 7: Cancel button

Select this button to exit the screen without saving any information.

Beginning Inventory Guidelines (Nurseries & Cultivators)

Before tags arrive, you should set up items in your account. This is a necessary first step before bringing your beginning plant inventory into the system. There is a two-step process for creating items. Each of these areas of Metrc is accessible via the Admin tab, as seen below.
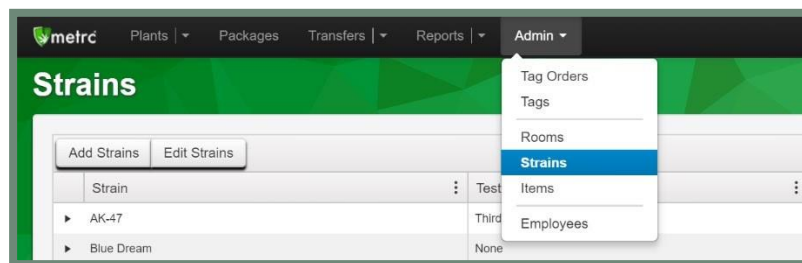
Setting Up Inventory

For all beginning plant inventory being brought in through the external transfer, you must first create the strain in your Metrc account. You may estimate the potency and Indica/Sativa genetics and edit those estimated values at a later date, if needed.

After strains have been created, you can create individual items with a name, category of product, and a default unit of measure. All items that will be created for beginning plant inventory will require an associated strain. The items used for beginning inventory will fall under the following item categories: Seeds, Immature Plants, Vegetative Plants, and Mature Plants. All plant items will be each-based the item name should describe the plant phase and the strain being brought in through the external transfer. In the following example, Immature Plants – Blue Dream is used to describe the plant package that will be brought in, indicating its strain and item category.

Creating and Tagging Packages

Once your tags have arrived and you have set up items in your Metrc account, you can create and tag your beginning inventory plant packages. This is also a two-step process where you will create and then complete an External Transfer. Incoming External Transfers are a feature in Metrc allowing licensees to receive product from outside of the system to account for your plant inventory being brought in from Medical Registrants/Caregivers. This feature should only be used for this purpose. When creating your authorized transfer from a medical registrant or caregiver, you are essentially transferring possession of items from that entity registered under the medical program to your adult-use entity licensed with OCP. This transfer of possession is documented as a new Incoming External Transfer under your OCP Adult Use license. The two-step process is as follows:

Step 1: Create the incoming external transfer

Create the incoming external transfer by clicking the "New Transfer" button once you've selected "External" under the Transfers tab on the navigation bar. This selection will bring up a screen where you will enter the required information to begin the process of creating your start-up inventory. You should complete the fields as follows:

Type

     Select the Medical/Caregiver Transfer option from the dropdown menu.

MMMP Number:

     Enter the Maine Medical Use of Cannabis Program (MMCP) registration number associated with the Medical Dispensary or Medical Caregiver.

Phone Number

Enter a valid phone number for the medical registrant from which the inventory is being transferred.

Planned Route

Denote that this is a transfer from a medical registrant/caregiver to an Adult Use license.

Item Name, Quantity, and Packaged Date

These fields correspond to the specific items and quantities being transferred. The date packaged should be the day that you received the items. The quantities should be exact and should account only for the plants you intend to bring into your adult use license.

Note: Clicking "Register Transfer" does not create tagged packages in your inventory; you must complete Step 2 (below) to complete the beginning inventory process.

Step 2: Complete the incoming external transfer and create tagged packages

Step 1 above creates a pending incoming transfer, as shown below, it does not associate RFID tags with those items. Without completing the transfer, you will have no inventory and will not be able to record your plant inventory correctly. To create tagged packages, you must complete the pending incoming transfer by clicking the "Complete" button to the far right and then entering the required information. The quantities entered in Step 1 will be auto populated; you should confirm the accuracy of the quantities and assign a unique RFID tag to each item. You must have physically and digitally received your initial tag order to complete this step. The tag assigned to the product in the system should be physically affixed to the associated product. Once the information is accurate and complete, clicking the "Complete Transfer" button will create the packages with the specified quantities in your inventory.

Step 3: Creating Plantings from Packages

After completing the Incoming External Transfer (as described on the previous page), the packages of seeds and plants will appear in your inventory in the Active section under the Packages tab on the navigation bar. For those seeds and plants that are intended for cultivation, you will now need to transition the plants into the Plants functionality.

Because these plants came off the External Transfer in packages, you will need to Create Plantings from each package to move the product into the Plants functionality. All plants, regardless of phase, will enter the Plants functionality as an immature planting. The vegetative and flowering plants must then be promptly transitioned out of the immature phase and into their respective phases for accurate inventory tracking. Once the associated package is empty, you will finish it in the system.
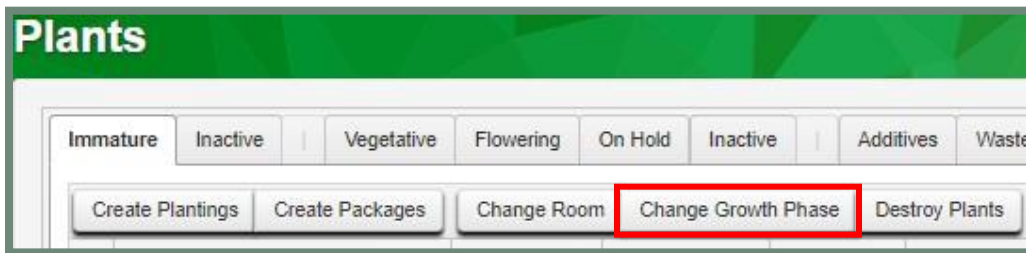
For batches of Vegetative or Flowering plants, you will select the "Change Growth Phase" button and fill out the information in the dialogue box to transition those plants to the correct phase.

After completing the change phase, the user will be required to tag every plant individually and ensure the plant tag numbers input at this step match the physical tags on the plants.

Definitions

Immature Plant: An immature plant means a cannabis plant that is not a mature cannabis plant or seedling. In Metrc, this is referred to as a "Vegetative" plant.

Mature Plant: A mature plant is a cannabis plant that is flowering. In Metrc, this is referred to as a "Flowering" plant.

Seedling: A seedling is a cannabis plant that is:

    a. Not flowering;
    b. Less than 24 inches in height; and
    c. Less than 24 inches in width.

In Metrc, this is referred to as an "Immature" plant.

Strain: A strain is a term used interchangeably with "cultivar," "variety," and "selection" within the cannabis industry.

Transport Manifest: A record, either paper or electronic, required by the Department for a licensed facility to document the possession and transfer of the cannabis or cannabis product on the premises, tracking all inventory, acquisition, sales, and waste disposal.

Additional Training & Support

Every valid IIC holder associated with a conditional or active adult use cannabis facility in Maine is entitled to unlimited online training from Metrc. These individuals can sign up for training by following the same process outlined in the "Required Metrc Training" section of this document.

In addition, links to Metrc support documents and training videos are available to every Metrc user in Maine via the "Support" dropdown near the upper right-hand corner of their screen in the Metrc system.

Lastly, every valid Metrc user is entitled to unlimited customer support directly from Metrc. Active licensees with questions regarding the use of the system can reach out to Metrc directly via the contact information detailed below:
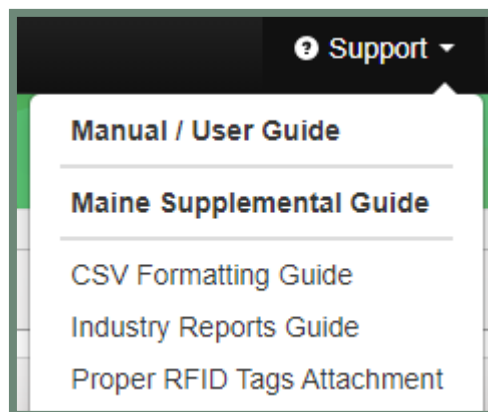
Metrc Customer Support

http://support.metrc.com
support@metrc.com
1-877-566-6506

Note: Questions regarding the use and operation of optional third-party software and/or hardware products should be redirected to their respective software and/or hardware vendors.