

Providers-Common Metrc Errors:



As a licensed provider, you can avoid these common Metrc mistakes.

This guide has been created by the Montana Cannabis Control Division (the Department) to address the common issues/errors that providers are currently making with respect to their Metrc account.

Addressing these issues in a proactive manner can assist in with time, effort, and finances for providers with respect to these errors.

#1- Creating the wrong product item name or category:

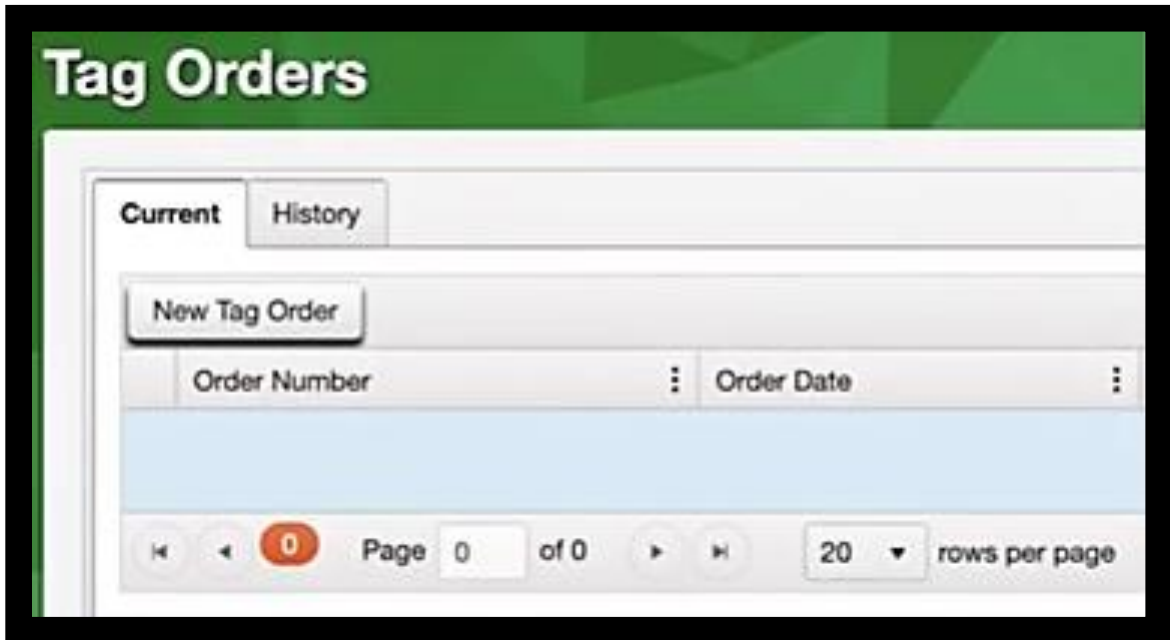
The screenshot shows a web form titled "Add Items" with a close button (X) in the top right corner. Below the title is "Item # 1" and a "(clear)" button. The form contains several fields: "Name" (an empty text box with a red border), "Unit of Measure" (a dropdown menu with "- Select -"), "Category" (a dropdown menu with "Flower (packaged gram - each)"), "Strain" (a dropdown menu with "- Select -"), and "Unit Weight" (a text box with "ex. 100.23" and a dropdown menu with "- Select -"). Below these fields is a quantity field with a "+" button and the number "1". A light blue informational box contains the text: "Why is there no multi-Facility create such as that available in Employees, Strains, and Locations? Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time." At the bottom of the form are two buttons: "Create Items" (green) and "Cancel" (grey).

- o There are certain **Item Categories** that require the provider to select a pre-existing strain and enter relevant information.
- o It is strongly recommended to use proper naming conventions at the very beginning stages.
- o Remain consistent with these naming conventions to avoid confusion and disruption of business operations.

| Example of an Organized Naming Convention |

<u>[BRAND NAME]</u>	<u>[ITEM CATEGORY]</u>	<u>[UNIT WEIGHT/VOLUME]</u>	<u>[STRAIN]</u>
Smith Farms	Flower	3.5 g	Wedding Cake

#2- Forgetting to order Metrc tags:



- o Every provider requires a certain type(s) of Metrc tag to operate. Providers should ensure they always have a sufficient supply of tags.

NOTE: When Metrc tags arrive, be sure to mark them as received in Metrc.

#3- Voiding an outgoing transfer after it has left its departure location:



- o Providers may create transfers **up to 24 hours** before the time of actual departure.
- o Voiding an outgoing transfer after it has left its departure location results in its **cancellation**. All the associated packages are then returned to the originating provider's inventory.
- o Voiding an outgoing transfer after it has left its departure location may result in the provider being issued a deficiency. Per [Montana Administrative Rule 42.39.413 \(5\)](#): the transport manifest may not be voided or changed after leaving the departure location.

#4- Marking that a transfer has been received before physically receiving it:

4. MARKING A TRANSFER RECEIVED BEFORE PHYSICALLY RECEIVING IT

Incoming (2/2) Outgoing (17/26) Rejected (2)


Manifest	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received	ETRD	ATRD	ETRA	ATRA	
▶ [REDACTED]	[REDACTED]	[REDACTED]	1	07/27/2020 01:00 pm		07/27/2020 04:00 pm							Receive

The transfers functionality in Merc is used every time cannabis is moved between licensees. When an outgoing transfer is initiated, the receiving licensee must double check the package(s) in the transfer prior to receiving them, to ensure the quantity written on the manifest matches what is in the physical packages. Another way for the originating licensee to receive inventory is when package(s) on an outgoing transfer are rejected by the receiving licensee. When this happens, the driver takes back the rejected goods physically and the warehouse manager then goes into Metrc to receive the rejected items in the Transfers > Rejected section. This is also an important time to check and ensure the driver brings back the complete / correct items that were rejected.

- o It is ill-advised to accept a transfer before ensuring the manifest matches what is in the physical packages as there could be missing and/or damaged product(s).
- o Providers should confirm/account for all inventory in the transfer **before** accepting it and entering it into their Metrc.
- o If the inventory's contents do not match the manifest, the provider may **reject** all of the inventory contained in the manifest or a portion of the inventory.

#5- Creating a production batch from an already tested package:

5. CREATING A PRODUCTION BATCH FROM AN ALREADY TESTED PACKAGE




Sample packages for testing can be created directly in Metrc by Distributors and Microbusinesses by selecting the 'Submit For Testing' button at the point they are about to be taken by a lab rep for testing. Once the sample is created and transferred to the lab, the lab directly updates the testing status of the source package being tested to 'TestPassed' or 'TestFailed' etc.

Packages created then from source packages with test results inherit the test result, *unless* the 'Production Batch' box is checked, which is typically used to identify concentrates, infused edibles or infused non-edibles at the time they are made. While there are many licensees using Production Batches incorrectly, you don't have to, and especially not when creating a package from an existing package that *has already tested and passed*. This is because checking the box resets the test results back to NotSubmitted on the package.

- o Sample packages are created directly in Metrc. Providers will select this by choosing the **Submit for Testing** button at the times the samples are going to be received by a licensed testing lab for testing.
- o Packages that are then created from the **Source Package** with test results inherit the test result unless the **Production Batch** box is checked.
- o Checking the **Production Batch** box on an existing package that has already been tested and passed will reset the test results back to **Not Submitted** on the package.
- o If a provider makes this error: **Discontinue** the package, and then create it again.

#6- Adjusting packages when the package should be discontinued:

6. ADJUSTING PACKAGES WHEN YOU SHOULD DISCONTINUE



Metric offers the option of discontinuing packages that are created from existing packages. Those with permissions can discontinue packages by clicking the [x] to the far right of the package, causing the inventory to go back into the source package from which it was created. Please note that this action can only be done inside of Metric, not via the API.

There are various scenarios in which users may want to discontinue a package, such as in the case when an incorrect Metric item was selected when creating a package out of an existing package. If this happens, users can change the item the package belongs to by selecting 'Changing Item' on the package within 24 hours of its creation. After that window, the only option will be to discontinue.

Another mistake that can happen is when a user specifies an incorrect amount on the output package being created from an existing package. In this case the best practice is to discontinue the package, not adjust it, even though you can adjust it. Why?

- o There are diverse scenarios where a provider may wish to discontinue a package. Users can change the item the package belongs to by selecting **Changing Item** on the package within 24 hours of its creation.

NOTE: If a provider adjusts their packages too often, Metric does note this on the account. The Department has access to these reports and may violate the provider accordingly.

By addressing these common mistakes, a provider can save time, effort, and money in the execution of their business operations.

Sources:

- o [ARM 42.39.314 \(5\): TRANSPORTATION OF MARIJUANA AND MARIJUANA PRODUCTS; MARIJUANA TRANSPORTER LICENSES](#)
- o [METRC-7 COMMON MISTAKES TO AVOID](#)