

Medical Beginning Metrc Steps for Michigan



Metrc System Access Information

Once a prospective licensee is approved for pre-qualification or licensure and has their license number or application ID, that marihuana business and their employees will then be eligible to sign-up for the **New Business Training Course**.

It is not a requirement for the business to have paid their license fee prior to signing-up for a training class. Each establishment is required to have an administrator in the Metrc system. The Metrc administrator is required to take the **New Business Training Course** at least once unless you are an existing Medical Marihuana Facility Licensee (MMFL). MMFL administrators will **NOT** need to take the **New Business Training Course** but will still need to add their new Adult Use Marihuana Facility License to their existing Metrc account.

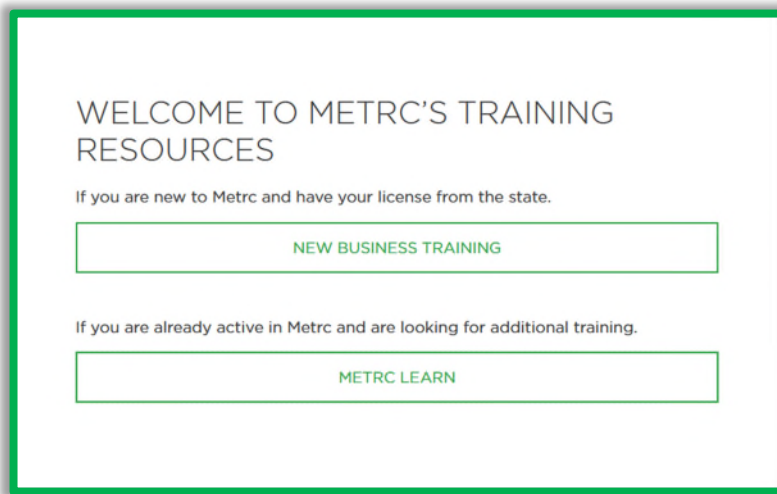
It is strongly recommended that any employee planning to operate in the Metrc system take the **New Business Training Course** to ensure they know how to accurately utilize the system.

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 **on demand**. The classes are instructor led and provide a thorough overview of the core functionality of the Metrc system.

Advanced training classes by license type are also available for licensees who have received licensure.

These classes are now setup for all approved businesses at no additional cost, and users can sign up by going to the Michigan Partner page on the Metrc website at www.metrc.com/michigan.



To sign-up for the **New Business Training Course**, the following information will need to be provided:

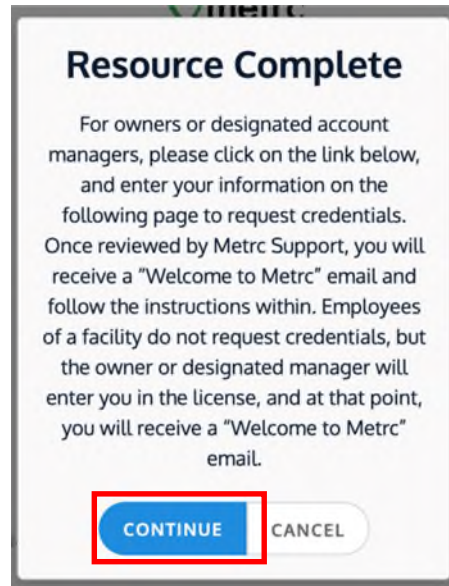
- Facility/Establishment license number (Can be application ID once the business is approved)
- Email
- First Name
- Last Name

First-Time Credentialing

The following guidance outlines the steps necessary for a business to receive access to the Metrc system for the first time. These steps will pertain to any new Medical Marihuana Facility Licensee or Adult Use Licensee that does not have an existing Medical Marihuana Facility License.

At least one business owner must complete the **New Business Training Course** to qualify to receive credentials and become a Metrc administrator for the facility or facilities.

After you complete training, you click Continue on the pop-up at the end of the video in order to request your credentials.



The business owner will then fill out the information on the Metrc Credentialing Process Form and click on the Submit button at the bottom of the page. The Credentialing form will require the following information:

1. Are you the owner?
2. If you are not the owner, then are you the designated Account Manager?
3. Full Name
4. Email
5. Phone Number (Format: 1-555-555-5555)
6. State
7. Facility License Type
8. State Assigned Badge/Permit (if not applicable, please provide DOB in MM/DD/YY format, and last four digits of SSN. For California licensees, please enter NA)
9. Business License Number(s)
10. Business Name or DBA

Metric Credentialing Process Form

The survey will take approximately 5 minutes to complete.

...

* Required

1. Are you the owner? *

☐ Yes

☒ No

2. If you are not the owner, then are you the designated Account Manager? *

☐ Yes

☐ No

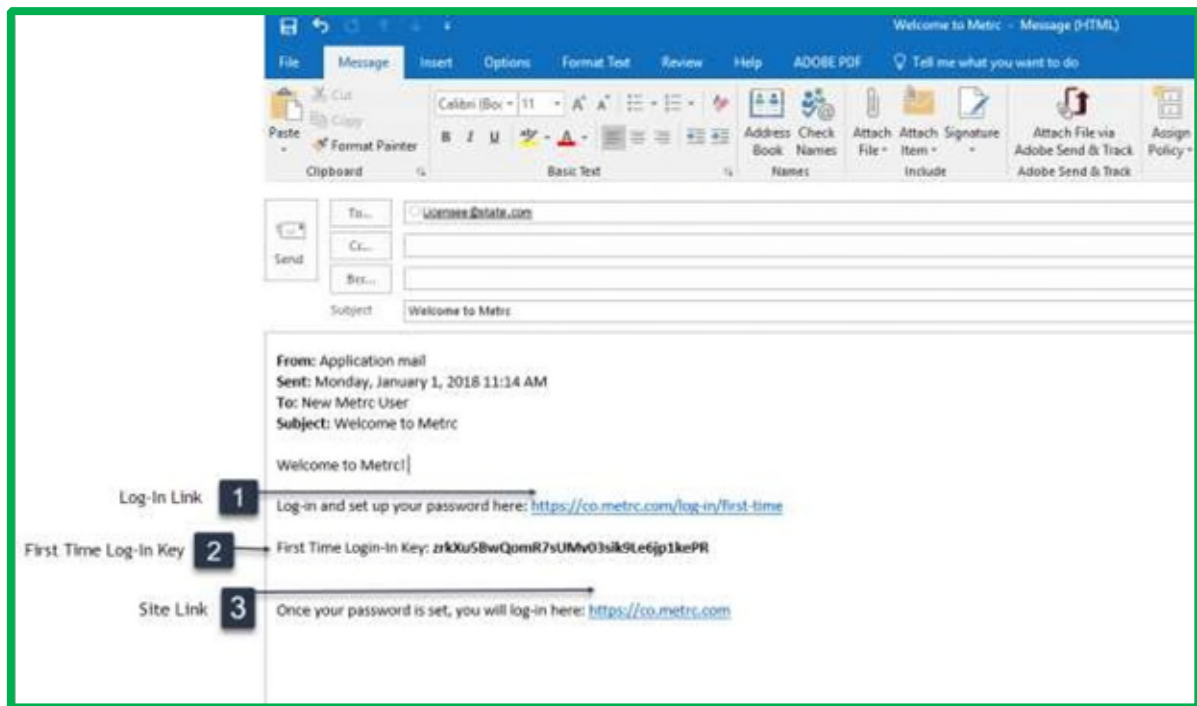
3. Full Name *

Enter your answer

4. Email *

Enter your answer

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 Metric" email like the one below.



This email contains your Log-in Link and a temporary password to access Metrc and set up your account.

The First-Time Log-in Key is good for 24 hours; you must log-in within 24 hours of when the link was sent!

Item 1: Log-in Link

<https://MI.metrc.com/log-in/first-time>

This link will take you to the first-time log-in page where you can use your key and temporary password to log-in.

Item 2: First Time Log-in Key

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

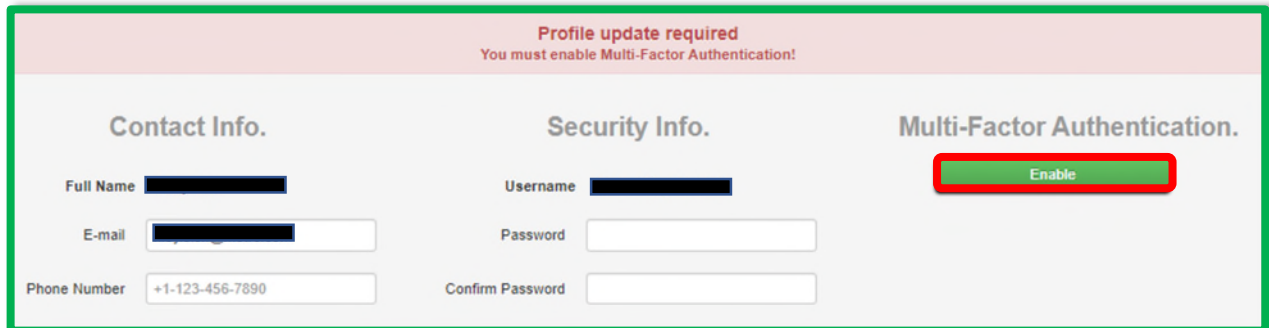
Item 3: Site Link

<https://MI.metrc.com>

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

Enabling Multi-Factor Authentication

When logging into your Metrc account, the user will need to enable the Multi-Factor Authentication in their license as seen in Figure 1.

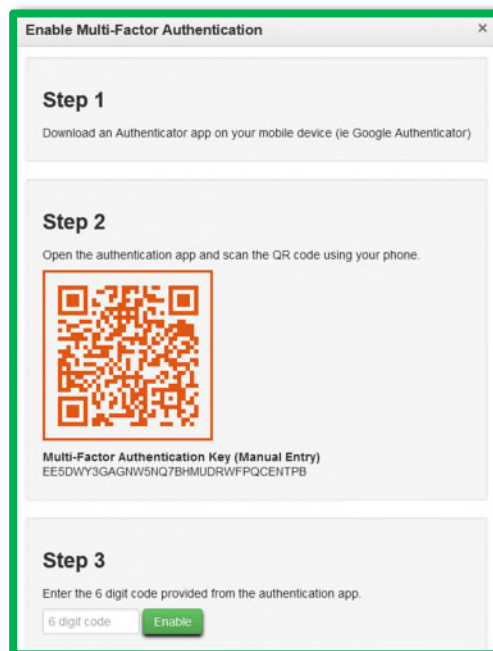


The screenshot shows a 'Profile update required' banner at the top. Below it are three sections: 'Contact Info.' with fields for Full Name, E-mail, and Phone Number; 'Security Info.' with fields for Username, Password, and Confirm Password; and 'Multi-Factor Authentication.' with a green 'Enable' button highlighted by a red rectangle.

Figure 1: Profile Update

Downloading and Using Authenticator App

When selecting to enable MFA, you will be prompted with the steps to finalize the setup. You'll either be able to use the QR code within the action window as seen in Figure 2 or use the Manual Entry key to receive your six-digit code.



The screenshot shows a window titled 'Enable Multi-Factor Authentication' with three steps: Step 1 (Download an Authenticator app), Step 2 (Open the app and scan the QR code), and Step 3 (Enter the 6 digit code). A QR code is displayed in Step 2, and a 'Multi-Factor Authentication Key (Manual Entry)' is provided below it. Step 3 includes a text input for the '6 digit code' and an 'Enable' button.

Figure 2: Authenticator Instructions

Download Backup Codes

Once your MFA is completed, it is highly recommended to download backup codes in the chance you lose your authenticator device or do not have it on hand for log in. These backup codes will not require access to the authentication application and can be stored in a safe location for usage when logging in going forward.

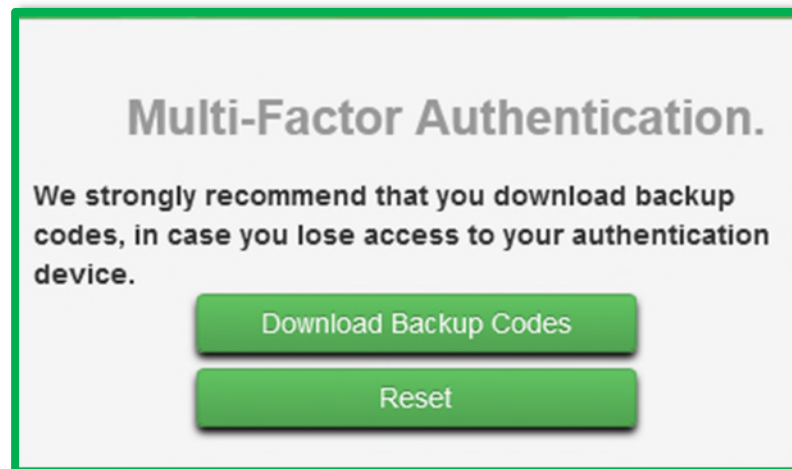


Figure 3: Download Backup Codes

Please note that if you lose your backup codes and no longer have access to your authentication application, you can reach out to support@metrc.com to reset your MFA which will prompt you to start the process of enabling it over again.

Log In Requirements

After MFA has been enabled and backup codes are downloaded, future log in requirements will prompt the Username and Password information to be entered as it currently works today and outlined in Figure 4.

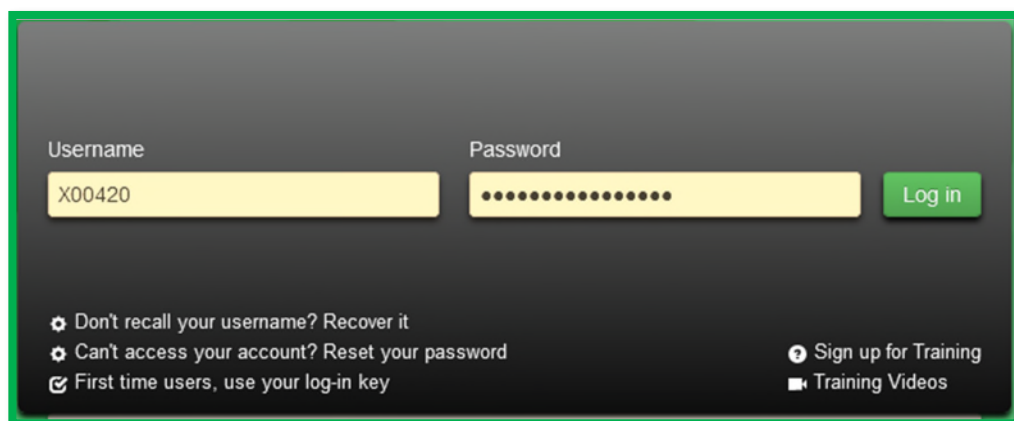


Figure 4: Download Backup Codes

Once the Username and Password have been correctly entered, you will be prompted to input either the MFA from the authentication app or a downloaded backup code. After that information is correctly validated, you will be directed to the standard home page to begin your session in Metrc.

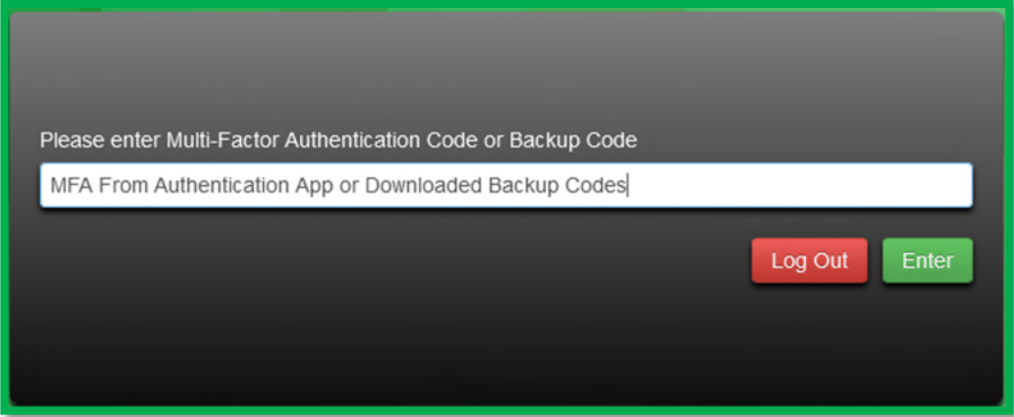
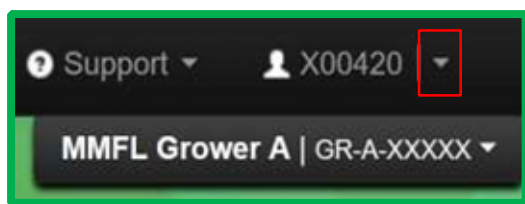
A screenshot of a web interface for Multi-Factor Authentication. It features a dark gray background with a white text prompt: "Please enter Multi-Factor Authentication Code or Backup Code". Below this is a white input field containing the placeholder text "MFA From Authentication App or Downloaded Backup Codes". To the right of the input field are two buttons: a red "Log Out" button and a green "Enter" button. The entire interface is enclosed in a green rectangular border.

Figure 5: Download Backup Codes

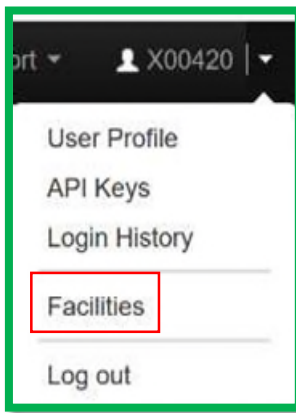
Adding New Facilities

The following guidance outlines the steps necessary for a business to input additional facilities to the Metrc system. **Please note: Only the Metrc admin can add facilities.** These steps will pertain to any existing Licensee that has been awarded additional Medical Marihuana or Adult Use licenses to their already operational business.

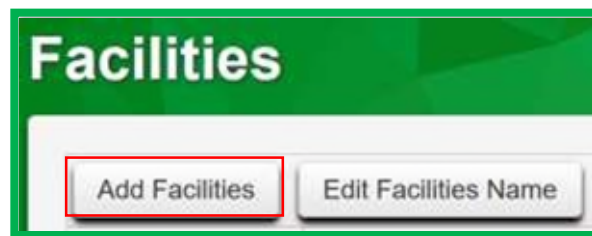
Step 1: Navigate to the upper right-hand corner of your Metrc account and select the dropdown next to your username.



Step 2: Once the dropdown populates select the **Facilities** option.



Step 3: Select the **Add Facilities** button.



Step 4: The Add Facilities action window will appear where you will need to input the facility license number associated with your business. The user will also need to designate the home page for that license number and the type of employment. Once this information is accurately inputted, select Add Facilities.

A screenshot of the 'Add Facilities' form window. The window has a title bar 'Add Facilities' and a close button. Inside, there's a section 'Facility # 1' with a '(clear)' button. Below this, there are two input fields: 'Facility Lic. No.' with the value 'AU-G-A-XXXXX' and 'Home' with a dropdown menu showing 'Admin'. There are also two checkboxes under 'Employment': 'Owner at this Facility' (checked) and 'Manager at this Facility' (unchecked). At the bottom, there are two buttons: 'Add Facilities' (green) and 'Cancel' (gray). The entire form is enclosed in a green rectangular border.

Please note: Only active licenses can be added. If the user tries to enter an inactive facility license number, they will receive an error. The license number will not include the middle A. For example, if AU-GA-C-000000 is the application number, the license number would be AU-G-C-000000.

Once you have access to your new license you will **immediately** need to order Metrc tags. Cultivators will need both plant and package tags; all other license types will only need package tags.

Medical growers are now permitted to hold their plant inventory within any of their colocated stacked licenses as long as the total plant count does not exceed the limits dictated by the total number of stacked/co-located class C licenses.

Example: A single medical grower class C license authorizes up to 1,500 marijuana plants. If a licensee holds five stacked medical grower class C licenses at the same address, that licensee can hold up to 7,500 marijuana plants on one of their five licenses if the other four licenses all hold zero plants.

Example: If a licensee holds four stacked medical grower class C licenses at the same address, two of the four licenses could each hold 3,000 marijuana plants if the other two licenses each held zero marijuana plants.

For a detailed explanation of these processes, refer to the Metrc bulletin found [here](#).

Please note, cultivators that do not wish to consolidate their plant counts are not required to participate. Further, there is no opt-in requirement or CRA approval necessary for a cultivator to begin executing either of the processes detailed in the Metrc bulletin referenced above.

How to Enter Medical Beginning Inventory

This document is intended to guide you through the process of tagging and reporting your medical beginning inventory in Metrc. This reference is designed as a step-by-step tool, but the information may be used at the discretion of your business processes. **The beginning inventory steps herein are not the same steps you will take to track your inventory in the system once your account is set up.**

There are two types of tagged inventory in Metrc: *Plants* and *Packages*.

Plants are Immature, Vegetative, or Flowering. All plants must enter the system through immature plant batches.

Packages are created from immature plants, harvest batches, or other packages.

You will place an order for tags for each of your organization's licenses. **Yellow** tags in Metrc designate the plants and packages for medical licensees. Each tag order will arrive and display your facility license number, name, and the unique identification number for that tag.

After you have placed your tag order, you will need to go into Admin tab and add all the Strains that will be within your facility. Then, you will need to go back into Admin tab and create all Items that the facility

will carry. Lastly, you will need to add all rooms for each license that indicate the location of plants and packages within your facility.

Metric tags are onetime use ONLY. If an error is made when assigning a tag to a plant, that plant's tag will need to be replaced using the "Replace Tag" option in the software. If an error is made when assigning a tag to a package, the package quantity in question would need to be discontinued. Once discontinued, that package can be found within the inactive tab in the system. A new correct package created with a new package tag.

When reporting beginning inventory, newly created immature plant batches can be immediately transitioned to reflect the phase the plants are in (in the case of existing Vegetative and/or Flowering inventory).

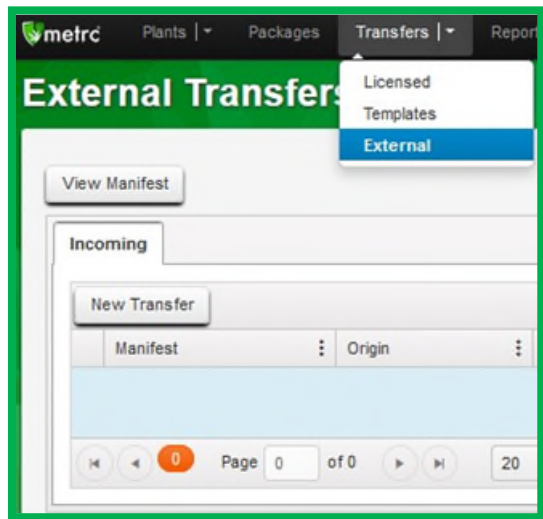
Harvested inventory is assigned a unique identifying batch name within the system. The weight of the product is reported based on the weight at harvest. Waste is reported from each harvest batch to account for all waste collected throughout the dry/cure process. Once the product is otherwise ready to transfer, it will be packaged. Packages, once they have been tested by a licensed Safety Compliance Facility (SCF) and have passed testing, can then be added to transfer manifests, and sent for further processing or sale.

Step-by-Step instructions begin on the next page.

External Incoming Transfers Steps

External Transfers are a two-step process which will require the user to go to the External Transfers Grid to create and receive the transfer into their active inventory. This process is only meant for licensees who are allowed by rule to intake caregiver inventory other than immature plants.

The two-step process is as follows:



Step 1: Creating an External Transfer

Once you've selected "External" under the Transfers tab on the navigation bar, create the incoming external transfer by clicking the "New Transfer" button. This will bring up a screen below where you will enter the required information to begin the process of receiving caregiver inventory. You should complete the fields as follows:

Type: Select the Caregiver transfer option from the dropdown menu.

Caregiver License Number: Registered caregiver registry identification number.

Phone Number: Enter a valid phone number. This can be designated as the business phone number and not the caregiver's personal number.

Planned Route: This can be stated as "Received and weighed at GR-B-00000".

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 are entering the items into Metrc. The quantities should be exact and should account only for the product being received.

New Incoming Transfer

Type: Caregiver

Caregiver License Number: Enter Caregiver Number Here

Phone No.: N/A or Licensee Phone #

Planned Route: Please enter that the product was received and verified in this section.

Est. Departure: 09/19/2019 today
06 : 35 AM

Est. Arrival: 09/19/2019 today
06 : 35 AM

Package # 1: White Widow Seeds (clear)

Quantity: 10 Each

Package Date: 09/19/2019 today

(package)

Register Transfer Cancel

Creating a pending incoming transfer from Step 1 does not immediately associate Metrc package tags with those items. Without completing the transfer, a licensee will not show the proper inventory and will not be in compliance with CRA inventory reconciliation requirements.

You must complete Step 2 (below) to complete the incoming external transfer, clicking “Register Transfer” does not create tagged packages in your inventory.

Step 2: Completing the External Transfer

Licensees **MUST** have package tags available to complete this step.

To create tagged packages, a licensee 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 **Yellow** Metrc package tag to each item. The tag assigned to the product in the system should be physically affixed to the associated product.

Once the information is accurate and complete, the “Complete Transfer” button should be selected which will create the packages with the specified quantities in your inventory.

External Transfers PC-XXXXX | 402R

View Manifest

Incoming

New Transfer

Manifest	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received	
0000001401	CXXX XXX	Caregiver	1	02/05/2019 05:16 pm		02/05/2019 05:16 pm			<input type="button" value="Edit"/> <input type="button" value="Complete"/> <input type="button" value="Void"/>

Complete Incoming Transfer

Manifest: 0000008003 Transfer Type: Caregiver

Origin Lic. No.: CXXXXX Origin Name:

Main Phone No.: 1234567890 Mobile Phone No.:

Employee ID: Vehicle Make:

Driver's Name: Vehicle Model:

Driver's Lic. No.: License Plate:

Phone No. for Questions:

Package # 1: 1A4FF0300000069000000013 Item: ACDC Clones Shipped Qty: 10 ea ☐ Reject

Room: Clone Room Receive Qty: 10 Each

Creating Plantings from Packages

After completing the Incoming External Transfer (as described on the previous page), the packages of seeds, clones, or plants will appear within your inventory in the Active section under the Packages tab on the navigation bar. For those seeds, clones or plants that are intended for cultivation, you will now need to transition them into the Plants section of Metrc. If you are planning on storing seeds, they would not need to be transitioned directly to the Plants section.

Because plants are required to be received in as a package through the External Transfers, you will need to Create Plantings from each package to move the product into the Plants section. All plants regardless of phase will enter the Plants functionality as an Immature planting.

Immature Plants are defined in the CRA administrative rules as a nonflowering marihuana plant that is no taller than 8 inches from the growing or cultivating medium and no wider than 8 inches produced from a cutting, clipping, tissue culture, or seedling that is in a growing or cultivating medium or in a growing or cultivating container.

Packages						
<div>Active On Hold Inactive</div> <div> New Packages Submit for Testing Remediate Create Plantings New Transfer Change Rooms Change Items Adjust Finish </div>						
Tag	Harvest	Room	Item	Category	Quantity	
▶ Q ABCDEF012345670000015157	Mass Test 9/13/18	Test Room	Mass Test Buds	Buds	1,200.5 g	
▶ Q ABCDEF012345670000015154	New Harvest	Harvest Room	Seeds - Purple Kush	Immature Plants	10 ea	
▶ Q ABCDEF012345670000015155	New Harvest	Test Room 3	Buds - Flo	Buds	20 g	
▶ Q ABCDEF012345670000015156	New Harvest	Test Room 3	Buds - Flo	Buds	20 g	
▶ Q ABCDEF012345670000015153		Test Room 2	Clones - Flo	Immature Plants	10 ea	

Create Plantings from Packages

Planting # 1

Package

ABCDEF012345670000015153

Q

Room

Type part of the Room name...

Q

Group Name

ABCDEF012345670000015153

Strain

Type part of the Strain name...

Q

Plants Type

- Select -

Planting Date

mm/dd/yyyy

today

Plants Count

ex. 100

Unpackage Date

mm/dd/yyyy

today

+

Create Plantings

Cancel

A preferred naming convention may be used for the Group Name but should include the Strain Name and date of planting (or entry in the case of beginning inventory). Strains and Rooms must already have been entered under the admin function on the navigation bar for selection here. Use today's date (the date of entry) for the "Planting Date".

Vegetative Plants

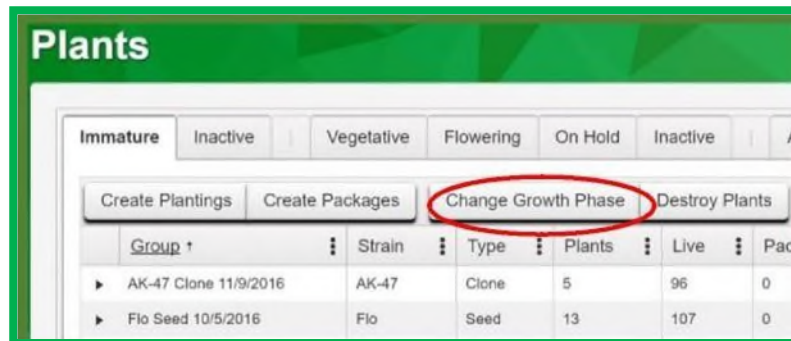
Vegetation is the sporophytic state of the marijuana plant which is a form of asexual reproduction in plants during which plants do not produce resin or flowers and are bulking up to a desired production size for flowering. Each vegging plant will be assigned a tag logged into Metrc.

Flowering Plants

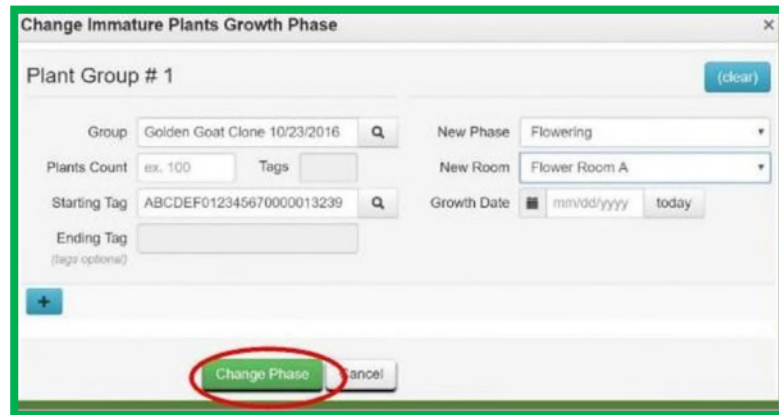
Flowering is the gametophytic or reproductive state of marijuana in which the plant is in a designated flowering space within a cultivation facility with a light cycle intended to produce flowers, trichomes and cannabinoids characteristic of marijuana.

Follow the steps below to move beginning inventory plants from the Immature Batch you created to the Vegetative or Flowering phases.

Step 1: Select the relevant Immature Batch by clicking on it, then select “Change Growth Phase”



Step 2: Populate the required information and select “Change Phase”



Fill the information top to bottom, left to right. That way you will have populated the Plants Count prior to selecting a Starting Tag from your available tags in the system. Doing it in this way allows the system to then auto-populate that number of tags in sequence for your use in identifying your beginning plants inventory. The physical plant tag must match the same tag they’ve been assigned in the Metrc system. Rooms must already have been entered under the admin function on the navigation bar for selection here. Use today’s date (the date of entry) for the “Growth Date”.

Additional Compliance Resources

[CRA Administrative rules](#) (searchable PDF)

CRA [Best Practices](#)

Additional Metrc training is available. Please refer to this [bulletin](#).

Please contact Metrc support at support@metrc.com or 877-566-6506 with any Metrc questions or for assistance on training signup and/or credentialing. Below is a QR Code which will allow you to create a contact in your phone with the email address and phone number of Metrc support.



Please contact the Cannabis Regulatory Agency Operations Support Section via email at CRA-compliance@michigan.gov with any compliance questions. Below is a QR Code which will allow you to create a contact in your phone with the email address for Operations Support.

