Montana Testing Facility User Guide

Metrc MT Testing Facility User Guide 21.4

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1. Terminology

- **Harvest Batch (In Metrc)** - A collection of harvested plants of the same strain which were cut down at the same time.

- **Harvest Lot Package (In Metrc)** – a package of no more than 5 pounds (lbs.) of Usable Marijuana of the same strain that have been grown, harvested and cured under uniform conditions. This includes dried leaves and flowers of the cannabis plant.

- **Production Batch (In Metrc)** - a group of weight or count based products that are no more than 5,000 unit-of-sale products and created from either raw marijuana material or a marijuana infused concentrate which produces a new and completely different product.

  a) An amount of cannabis concentrates, or extract produced in one production cycle using the same extraction methods and standard operating procedures.

  b) An amount of a type of cannabis product produced in one production cycle using the same formulation and standard operating procedures.

- **Package (In Metrc) -** An amount of marijuana that may be sold, processed or transferred and must be placed into one or more containers, each having a unique RFID tag.

- **Test Sample (In Metrc)** – Physical Sampling of dried and cured product or true overall sampling of a Harvest Lot or Production Batch pulled by a laboratory representative in accordance with Montana Rules and Regulations.

Terms are the terminology used in Metrc for familiarity of the software and to know when to utilize certain components in Metrc.

2. Package tags

Metrc generates the ID numbers automatically and assigns them to a single facility.

1. The Package Tag is made specifically for packaging and transfer use and includes a 24-digit alpha-numeric serial number.

2. The Package Tag is perforated with the upper and lower package tag number being the same.

3. The Package Tags are color coded Yellow for Medical.

4. The Testing Lab does not take any portion of the package tags from the batch packages that are being sampled from.

5. The Package Tag breaks into 2 pieces:
   a. One portion is affixed to the Test Sample Container
   b. The other portion can be used on the testing facility's paperwork.

3. Packaging & Sampling Information

- Item names are used to identify what type of item is put into a Metrc package.
    - Blue Dream Bud
    - Shake/Trim
    - Flower – Blue Dream

- Batch Packages must be pulled from Harvests by the licensee prior to sampling being done.

- Test Samples must be pulled from Harvest Lot Packages or Production Batches (not Harvest Batches)

- If licensee does not know how to make their Batch packages or Test Samples in Metrc, have them call Metrc to learn how
    - If you try to help a licensee, the packages/samples may be made incorrectly

    - If licensee never learns how to make packages/samples correctly, it delays your time at that licensee's facility

    - If you don't know how to make samples at your testing lab, please call Metrc

- Sampling Protocols

    - Lab Representative goes to licensee's location and pulls samples physically while maintaining the chain of custody

        - Lab Representative samples at licensee's location

            - Lab Representative goes to licensee's facility and samples

            - Lab Rep physically creates test sample(s) and gives weight or count information to licensee

            - Licensee electronically creates Test Sample(s) in Metrc from their Batch Packages

            - Licensee gives physical Test Sample(s) Package Tag to Lab Rep

            - Lab Rep sticks a portion of the Test Sample Package Tag to the correct Test Sample container

            - Licensee electronically creates Transfer/Manifest in Metrc to manifest all test samples to the Testing Lab

- Licensee prints physical copy of the Transfer/Manifest from Metrc for Lab Rep to take with them

- Licensee gives physical copy of Transfer/Manifest from Metrc to Lab Rep

- R&D Test Samples results will not be entered in Metrc unless otherwise instructed by the state.

3.1 Test Samples - Keep in Mind

- The licensee will create and transfer test samples electronically in Metrc to the testing facility
- Test samples pulled from Harvest Lot packages should include the strain name if the test sample is of bud/flower.
- Test samples pulled from Production Batches should carry the same item name as the production batch they are being pulled from.
- The licensee will create and transfer test samples physically and electronically to the testing facility via the Transport Manifest.
- There is one test sample per Metrc package tag.
- Test samples pulled from a package should include the strain name of the product if the test sample is raw useable marijuana or being sold strain specifically.
- Test samples pulled from production batches should carry the same item name as the production batch they are being pulled from.

Packaging and Sampling of Cannabis

Packaging and Sampling of Manufactured Cannabis Products

- A test sample package cannot be discontinued unless the sample package was created by that specific testing facility and it has not been pulled from, adjusted or transferred.

- A package can be finished as long as the package is zero, there is no more product in it.

- A finished package can be unfinished, but a discontinued package cannot be unfinished.

- When adjusting a package, you must use the appropriate adjustment reason set up by the state and the notes section to explain why the package needed to be adjusted.

- In order to send a Sub-Contracted sample for testing, a new sub-sample package must be pulled from the original test sample package using the Submit for Testing button and get a new package tag.

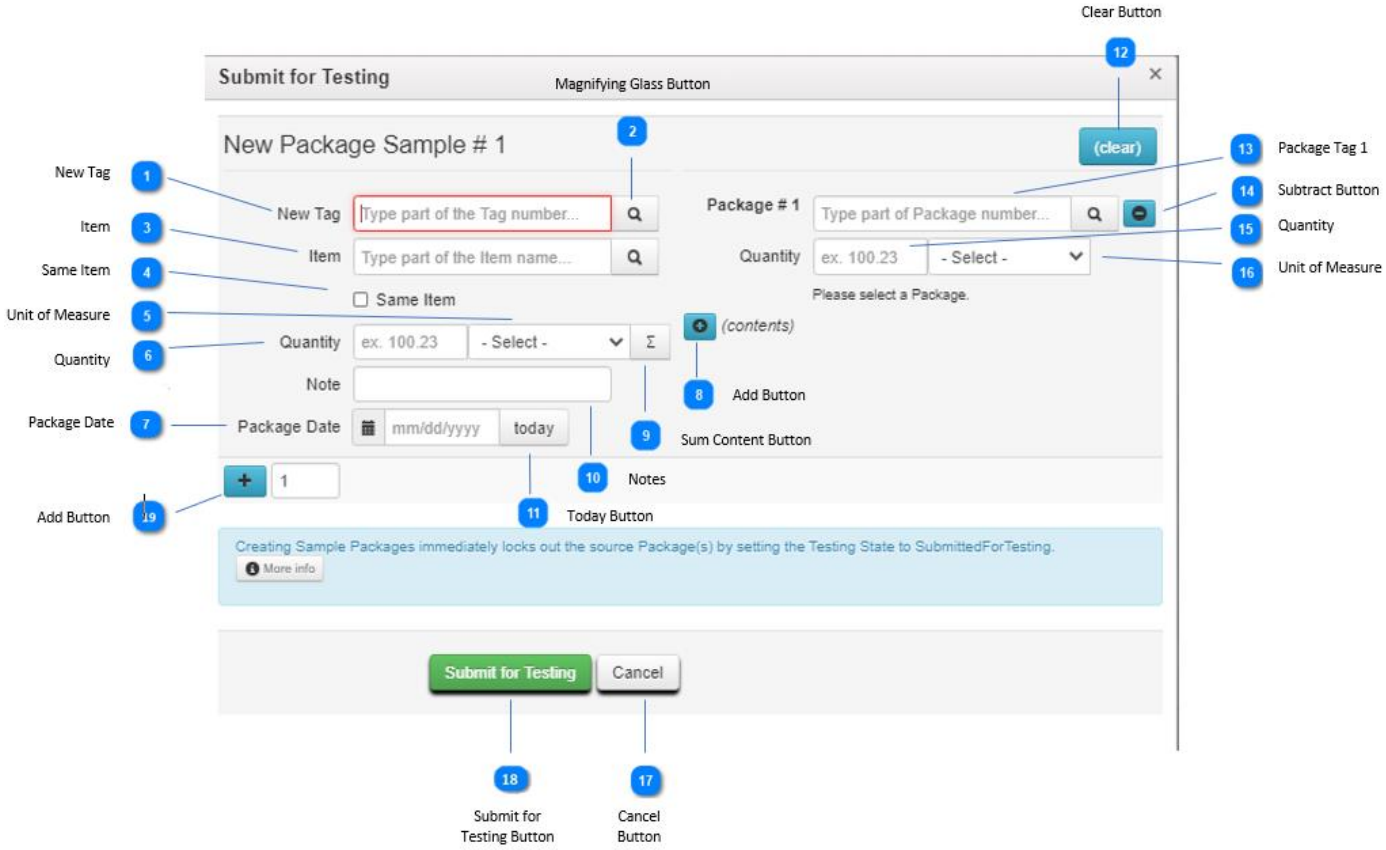
- When a sub-sample is created, Test results must be entered by the Sub-Contracted Testing Facility.

- R&D Test Samples results will not be entered into Metrc unless otherwise instructed by the state.

3.1.1 Physical Composite Test Sample

At the testing laboratory a physical composite test sample is prepared using all product sizes included in the test sample package. The entire representative sample must be homogenized prior to analyses, notwithstanding foreign material testing. The physical composite test sample is NOT recorded in Metrc. However, testing is performed on that physical composite sample and the test results recorded in Metrc on the test sample package, as described in upcoming sections of the guide.

4. Creating Sub-Contracting Samples Packages from Existing Test Sample Packages



Only one Sub-Contracted test per Metrc package tag is allowed. This prevents multiple test results of the same testing type from being entered into a single parent package. All Sub-Contracted test samples must have test results entered in Metrc. To create a Sub-Contracted Test Sample, click on the existing test sample listed in the Active Packages list of test samples currently in the license inventory. This will highlight the test sample in orange. Then click on the Submit for Testing button. This will bring up the pop-up window above.

1

New Tag

New Tag is used to identify the new Sub-Contracted Test Sample associated with the new test sample currently being created to be sent to another testing lab.

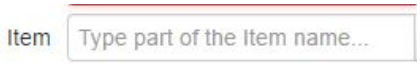
2

Magnifying Glass button

Magnifying Glass button is used to display a list of available Package Tag numbers that are currently available for use.

3

Item



Item is used to identify the Item Name of the product currently being created. Item names must be created prior to creating a new sub-sample.

4

Same item

The same item is used to select the same item that is contained in the source package.

5

Unit of Measure Drop Down

Unit of Measure Drop Down is used to select the unit of measure for the current test sample package being created. This will be either weight based, or count based.

6

Quantity

Quantity is used to identify the amount of weight-based product or count-based items that are being put into the current sub-sample package being created.

7

Package Date

Package Date is used to identify the date the current sub-sample package is being created. You can select the today button or enter a date.

8

Add button

Add button is used to add another New Package to be created simultaneously. Keep in mind that every sub-sample package must have a contents section.

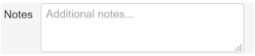
9

Sum Content button

The Sum Content button is used to automatically calculate the sum of the new sample package based on the combined quantities of the amount pulled from each existing package. The unit of measure must be filled in for the new package being created for the system to calculate the total quantity correctly. This will help eliminate mistakes in calculating the true weight/count of your new package.

10

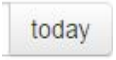
Notes



Notes is used to enter any supporting information regarding test results. For example, the testing laboratory may choose to include the internal LIMS ID, provide more information regarding the result, enter additional information if this was a remediated batch test result, etc.

11

Today button



Today button can be used to auto populate the current date that the current package is being created on.

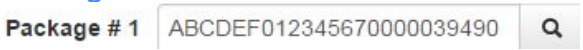
12

(clear) button

Clear button is used to clear all entries that have been entered into the current sections.

13

Package #1



Package #1 is used to identify which test sample package(s) is being pulled from to create the new sub-sample package.

14

Subtract button

The subtract button is used to remove the current contents sample package. Keep in mind that every sub-sample or sample package must have a contents section.

15

Quantity

Quantity is used to state the exact quantity of weight based or count based product(s) is/are being used to create the new sub-sample package.

16

Unit of Measure

Unit of Measure is used to identify the current unit of measure of the test sample package being pulled from to create the new sub-sample package.

17

Cancel button

Cancel button is used to exit the current screen without making any new sub-sample packages and return to the previous screen.

18

Submit for Testing button

The Submitted for Testing button is used to create the new sub-sample package(s). A water mark will appear next the packages tag once the sample has been created.

19

Add button

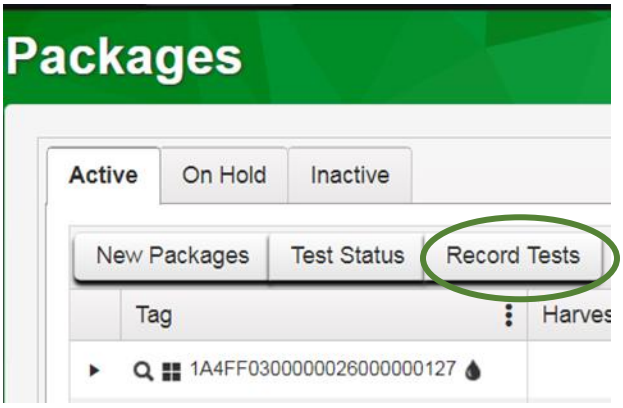
The add button is used to add another contents package if pulling from multiple test sample packages.

5. Transfers - Keep in Mind

- A transfer must be created anytime a package or test sample moves from one license number to another even if those licenses are in the same physical location.
- A Manifest Transfer is the only way to electronically move from one licensee's inventory to a testing lab's inventory.
- Testing Facilities should NOT transfer any product to another licensee except in the case of Sub-Contracting test samples to another testing facility unless otherwise instructed to do so.
- To print a manifest, click on the manifest number to be printed to highlight the manifest in orange, then click on the View Manifest button. The manifest may be printed.
- A package must be received completely: the system DOES NOT allow for a partial package to be received (1/2, 3/4, 1/4 of a package). A testing facility cannot receive part of an each. They must receive whole eaches or whole units.
- A transfer can be rejected by individual package or the entire transfer can be rejected completely.
- A rejected sample package will require the originating Licensee to receive the package back into their custody.
- A package must exist in order for it to be selected for transfer. Transfers are real-time inventory dependent.
- If you receive a test sample package, you will have the opportunity to report a new weight (i.e. scale variance) or a more scientific weight (i.e. up to 4 places after the decimal).
- You must receive the transfer as soon as it is received physically, and weight or count is verified.
- See Transfers Area in the Metrc Manual/User Guide for instructions on creating a Transport Manifest correctly in Metrc.

6. Manually Entering Test Results

To begin recording test results, from the active packages inventory, a testing laboratory will select the test sample package tag that requires test results and select the Record Tests button as shown.



All required tests must be entered at the same time in Metrc.

On the *Record Tests* page, the testing laboratory will:

- Select the date testing was performed.
- Select the *Test Batch* appropriate to the product being tested and record the *Test Result*, *Status* (*Passed or Failed)*, and *Notes* as appropriate to each test performed.

Once all test results have been recorded, select the *Record Tests* green button.

7. Testing Types

Lab Test Type
Abamectin (ppm) Concentrates/Extracts
Abamectin (ppm) Raw Plant Material
Acequinocyl (ppm) Concentrates/Extracts
Acequinocyl (ppm) Raw Plant Material
Acetone (ppm)
Arsenic (ppm) Concentrates/Extracts
Arsenic (ppm) Raw Plant Material
Benzene (ppm)
Bifenazate (ppm) Concentrates/Extracts
Bifenazate (ppm) Raw Plant Material
Bifenthrin (ppm) Concentrates/Extracts
Bifenthrin (ppm) Raw Plant Material
Butane & All Isomers (ppm)
Cadmium (ppm) Concentrates/Extracts
Cadmium (ppm) Raw Plant Material
CBD (%) Raw Plant Material & Concentrates/Extracts
CBD (mg/g) Infused Products
CBDA (%) Raw Plant Material & Concentrates/Extracts
CBDA (mg/g) Infused Products
Chlormequat Chloride (ppm) Concentrates/Extracts
Chlormequat Chloride (ppm) Raw Plant Material
Chloroform (ppm)
Culturable Mold (CFU/g)
Cyclohexane (ppm)
Cyfluthrin (ppm) Concentrates/Extracts
Cyfluthrin (ppm) Raw Plant Material
Daminozide (ppm) Concentrates/Extracts
Daminozide (ppm) Raw Plant Material
Dichloromethane (ppm)
E. Coli (CFU/g)
Ethyl Acetate (ppm)
Etoxazole (ppm) Concentrates/Extracts
Etoxazole (ppm) Raw Plant Material
Fenoxycarb (ppm) Concentrates/Extracts
Fenoxycarb (ppm) Raw Plant Material
Filth and Foreign Matter (%)
Heptane (ppm)

Hexane & All Isomers (ppm)
Imazalil (ppm) Concentrates/Extracts
Imazalil (ppm) Raw Plant Material
Imidacloprid (ppm) Concentrates/Extracts
Imidacloprid (ppm) Raw Plant Material
Isopropanol (2-Propanol) (ppm)
Lead (ppm) Concentrates/Extracts
Lead (ppm) Raw Plant Material
Mercury (ppm) Concentrates/Extracts
Mercury (ppm) Raw Plant Material
Methanol (ppm)
Moisture Content (%)
Myclobutanil (ppm) Concentrates/Extracts
Myclobutanil (ppm) Raw Plant Material
Ochratoxin A (ppb)
Paclobutrazol (ppm) Concentrates/Extracts
Paclobutrazol (ppm) Raw Plant Material
Pentane & All Isomers (ppm)
Propane (ppm)
Pyrethrin & All Isomers (ppm) Concentrates/Extracts
Pyrethrin & All Isomers (ppm) Raw Plant Material
Salmonella (CFU/g)
Spinosad (ppm) Concentrates/Extracts
Spinosad (ppm) Raw Plant Material
Spirotetramat (ppm) Concentrates/Extracts
Spirotetramat (ppm) Raw Plant Material
Terpenes (%)
THC (%) Raw Plant Material & Concentrates/Extracts
THC (mg/g) Infused Products
THCA (%) Raw Plant Material & Concentrates/Extracts
THCA (mg/g) Infused Products
Toluene (ppm)
Total Aflatoxins (B1, B2, G1, & G2) (ppb)
Total CBD (%) Raw Plant Material & Concentrates/Extracts
Total CBD (mg/g) Infused Products
Total THC (%) Raw Plant Material & Concentrates/Extracts
Total THC (mg/g) Infused Products
Trifloxystrobin (ppm) Concentrates/Extracts
Trifloxystrobin (ppm) Raw Plant Material
Xylene & All Isomers (ppm)

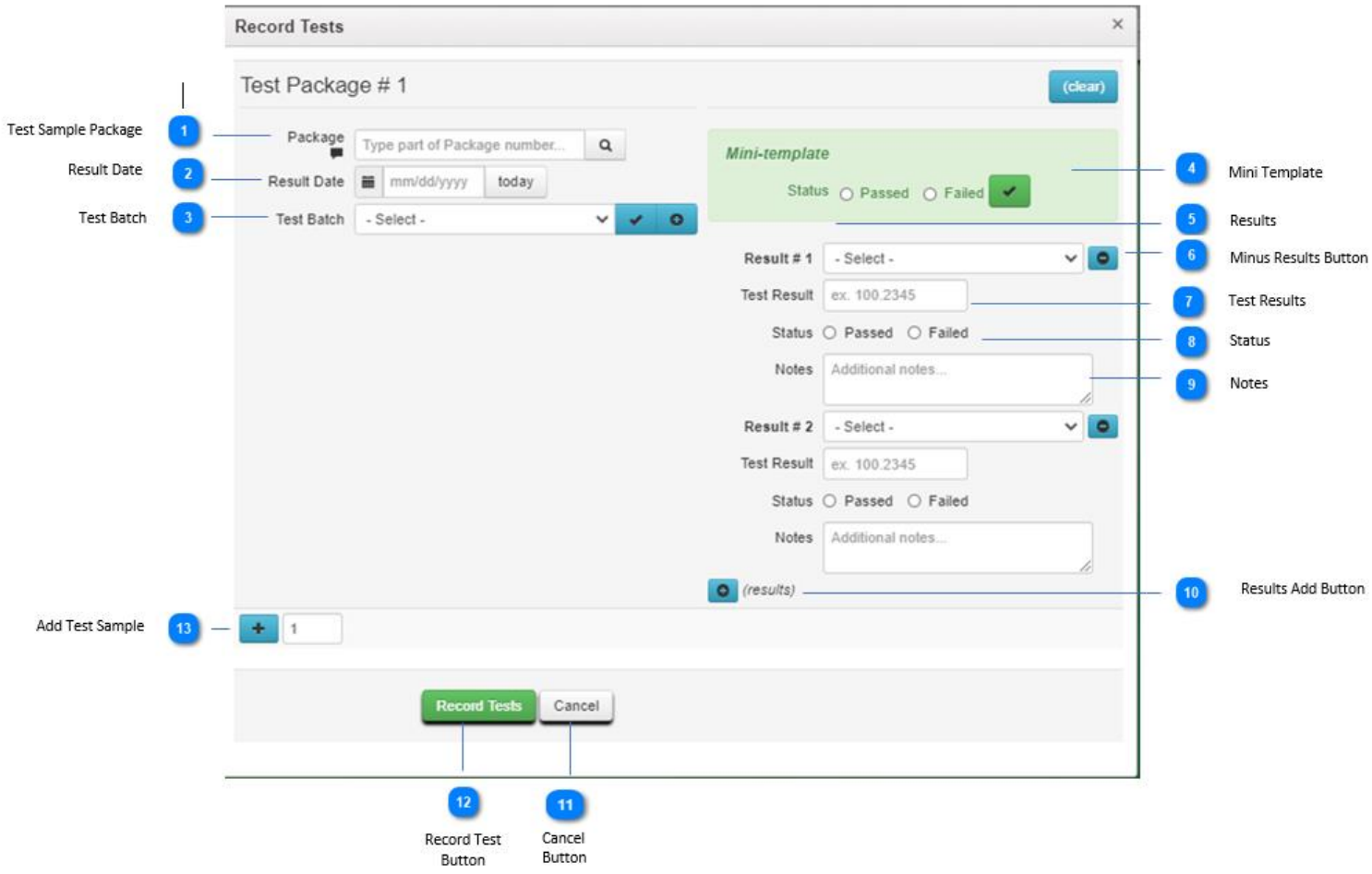
- ALL Required testing must be entered into Metrc including passing and failing results unless instructed otherwise by The Montana Medical Marijuana Program.

- All results should be entered completely & scientifically with all information included.

- A Testing Facility Internal Test Number may be entered for that testing facility to know what specific Internal Test Number that test results refers to. This is optional.

- Use the *Test Results* box to enter the value found during the analysis and the *Notes* section to provide specific details for any failure

8. Entering Test Results



1

Test Sample Package ID

Package Type part of Package number...

Test Sample Package ID is the test sample package tag number that corresponds to the test results that are being entered.

2

Results Date

Result Date mm/dd/yyyy today

Results Date is the date that the test result(s) are being entered. The Today button can be used to enter the current date. Do not back date test results unless instructed to do so.

3

Test Batch

Test Batch is used to populate the Test Types to be recorded in Metrc. Test Batches include all the Test Types required for a specific product type. Select the Test Batch associated to the product being tested.

4

Mini Template

Mini template is used to enter a pass or fail status to multiple test results if so desired by the test facility. This must be used in conjunction with the green Auto-populate button (green check mark).

5

Result

Result is used to choose the specific test type that was performed.

6

Minus button

Minus button is used to remove the specific test result that is being entered.

7

Test Result

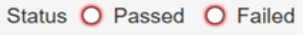
Test Result is used to enter a specific quantity or result for the test type/analyte being entered. The test result box can have whole numbers or numbers with up to 4 decimal places. This number should reflect the value yielded during analysis of the test sample.

All sample test results must be entered into Metrc, including passing and failing results. All results should be entered accurately, completely, and by following the AMCO regulations.

If the *Test Result* exceeds the action level specified in the AMCO's regulations, the status must be Test Failed.

8

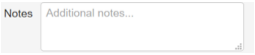
Status



Status is used to indicate a Passed or Failed result for the specific test type performed.

9

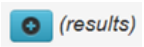
Notes



Notes is used to enter any supporting information regarding test results. For example, the testing laboratory may choose to include the internal LIMS ID, provide more information regarding the result, enter additional information if this was a remediated batch test result, etc.

10

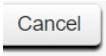
Add Results Button



Add Results button is used to add an additional *Test Result* if necessary. A testing laboratory can add as many results as necessary to complete any required and/or additional tests and add the test type/analyte name(s) for the additional tests.

11

Cancel button



Cancel button is used to cancel out of the test result screen without entering the test results at all.

12

Record Tests Button

Record Tests button is used to record and save the specific test results that have been entered by a testing facility to the specified test samples. Please note, once the *Record Tests* button is selected, the results entered may **not** be removed.

13

Add Test Sample button

Add Test Sample button is only used when manually entering test results to more than one test sample package at the same time. This is not used to enter test results to multiple test sample packages simultaneously.

Test Category	How to Enter Result
Filth and Foreign Matter	Result #1 Select “Filth and Foreign Matter (%)” and select pass or fail as the status then enter the value detected during analysis. Utilize the Notes section to enter any additional information necessary.
Heavy Metals – Concentrate/Extract	Result #1 "Cadmium (ppm) Concentrate/Extract" enter the specific value detected during analysis then select pass or fail as the status. Utilize the Notes section to enter any additional information necessary. Result #2 "Arsenic (ppm) Concentrate/Extract" enter the specific value detected during analysis then select pass or fail as the status. Utilize the Notes section to enter any additional information necessary. Result #3 "Lead (ppm) Concentrate/Extract" enter the specific value detected during analysis then select pass or fail as the status. Utilize the Notes section to enter any additional information necessary. Result #4 "Mercury (ppm) Concentrate/Extract" enter the specific value detected during analysis then select pass or fail as the status. Utilize the Notes section to enter any additional information necessary.
Heavy Metals – Raw Plant Material	Result #1 "Cadmium (ppm) Raw Plant Material" enter the specific value found during analysis then select pass or fail as the status. Utilize the Notes section to enter any additional information necessary. Result #2 "Arsenic (ppm) Raw Plant Material " enter the specific value detected during analysis then select pass or fail as the status. Utilize the Notes section to enter any additional information necessary. Result #3 "Lead (ppm) Raw Plant Material " enter the specific value detected during analysis then select pass or fail as the status. Utilize the Notes section to enter any additional information necessary. Result #4 "Mercury (ppm) Raw Plant Material " enter the specific value detected during analysis then select pass

	or fail as the status. Utilize the Notes section to enter any additional information necessary.
Microbiologicals	Result #1 Select "Total Aflatoxins (B1, B2, G1, & G2) (ppb)" and select pass or fail as the status, then enter the value detected. In the notes section enter information regarding testing for Aflatoxin B1, B2, G1, and G2. Utilize the Notes section to enter any additional information necessary. Result #2 Select “Culturable Mold (CFU/g)” and select pass or fail as the status then enter the value detected. Utilize the Notes section to enter any additional information necessary. Result #3 Select "E. Coli (CFU/g)" and select pass or fail as the status then enter the value detected. Utilize the Notes section to enter any additional information necessary. Result #4 Select “Ochratoxin A (ppb)” and select pass or fail as the status then enter the value detected. Utilize the Notes section to enter any additional information necessary. Result #5 Select “Salmonella (CFU/g)” and select pass or fail as the status then enter the value detected. Utilize the Notes section to enter any additional information necessary.
Moisture Content	Result #1 Select “Moisture Content (%)” and select pass or fail as the status, then enter the percentage detected. Utilize the Notes section to enter any additional information necessary.
Pesticides – Concentrate/Extracts	Result #1 Select “Abamectin (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #2 Select “Acequinocyl (ppm) Concentrates/Extracts” and select pass or fail as the

	status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #3 Select “Bifenthrin (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #4 Select “Bifenazate (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #5 Select “Chlormequat Chloride (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #6 Select “Cyfluthrin (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #7 Select “Daminozide (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #8 Select “Etoxazole (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #9 Select “Fenoxycarb (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #10 Select “Imazalil (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #11 Select “Imidacloprid (ppm) Concentrates/Extracts” and select pass or fail as the

	status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #12 Select “Myclobutanil (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #13 Select “Paclobutrazol (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #14 Select “Pyrethrin & All Isomers (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #15 Select “Spinosad (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #16 Select “Spirotetramat (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #17 Select “Trifloxystrobin (ppm) Concentrates/Extracts” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary.
Pesticides – Raw Plant Material	Result #1 Select “Abamectin (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #2 Select “Acequinocyl (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #3 Select “Bifenthrin (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM

	detected. Utilize the Notes section to enter any additional information necessary. Result #4 Select “Bifenazate (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #5 Select “Chlormequat Chloride (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #6 Select “Cyfluthrin (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #7 Select “Daminozide (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #8 Select “Etoxazole (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #9 Select “Fenoxycarb (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #10 Select “Imazalil (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #11 Select “Imidacloprid (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #12 Select “Myclobutanil (ppm) Raw Plant Material” and select pass or fail as the status, then enter

	the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #13 Select “Paclobutrazol (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #14 Select “Pyrethrin & All Isomers (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #15 Select “Spinosad (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #16 Select “Spirotetramat (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #17 Select “Trifloxystrobin (ppm) Raw Plant Material” and select pass or fail as the status, then enter the PPM detected. Utilize the Notes section to enter any additional information necessary.
Potency – Raw Plant Material & Concentrates/Extracts	Result #1 Select "CBD (%) Raw Plant Material & Concentrates/Extracts" and select pass or fail as the status, then enter the % of CBD detected. Utilize the Notes section to enter any additional information necessary. Result #2 Select "CBDA (%) Raw Plant Material & Concentrates/Extracts " and select pass or fail as the status then enter the % of CBDA detected. Utilize the Notes section to enter any additional information necessary. Result #3 Select "THC (%) Raw Plant Material & Concentrates/Extracts " and select pass or fail as the status then enter the % of THC detected. Utilize the Notes section to enter any additional information

	necessary. Result #4 Select "THCA (%) Raw Plant Material & Concentrates/Extracts " and select pass or fail as the status then enter the % of THCA detected. Utilize the Notes section to enter any additional information necessary. Result #5 Select “Total CBD (%) Raw Plant Material & Concentrates/Extracts” and select pass or fail as the status then enter the % of Total CBD. Utilize the Notes section to enter any additional information necessary. Result #6 Select “Total THC (%) Raw Plant Material & Concentrates/Extracts” and select pass or fail as the status then enter the % of Total THC. Utilize the Notes section to enter any additional information necessary.
Potency – Infused Products	Result #1 Select "CBD (mg/g) Infused Products" and select pass or fail as the status, then enter the mg/g of CBD detected. Utilize the Notes section to enter any additional information necessary. Result #2 Select "CBDA (mg/g) Infused Products " and select pass or fail as the status then enter the mg/g of CBDA detected. Utilize the Notes section to enter any additional information necessary. Result #3 Select "THC (mg/g) Infused Products " and select pass or fail as the status then enter the mg/g of THC detected. Utilize the Notes section to enter any additional information necessary. Result #4 Select "THCA (mg/g) Infused Products " and select pass or fail as the status then enter the mg/g of THCA detected. Utilize the Notes section to enter any additional information necessary. Result #5 Select “Total CBD (mg/g) Infused Products” and select pass or fail as the status then enter the mg/g of Total CBD. Utilize the Notes section to enter any additional information necessary. Result #6 Select “Total THC (mg/g) Infused Products” and select pass or fail as the status then enter the mg/g of

	Total THC. Utilize the Notes section to enter any additional information necessary.
Residual Solvents	Result #1 Select "Acetone (ppm)" and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #2 Select "Benzene (ppm)" and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #3 Select "Butane & All Isomers (ppm)" and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #4 Select "Chloroform (ppm)" and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #5 Select "Cyclohexane (ppm)" and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #6 Select "Dichloromethane (ppm)" and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #7 Select "Ethyl Acetate (ppm)" and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #8 Select "Heptane (ppm)" and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary.

	Result #9 Select “Hexane & All Isomers (ppm)” and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #10 Select “Isopropanol (2-propanol) (ppm)” and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #11 Select “Pentane & All Isomers (ppm)” and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #12 Select “Propane (ppm)” and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #13 Select “Toluene (ppm)” and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary. Result #14 Select “Xylene & All Isomers (ppm)” and select pass or fail as the status then enter the PPM detected. Utilize the Notes section to enter any additional information necessary.
Terpenes **This Test Type is not required but available for voluntary testing.**	Result #1 Select “Terpenes” and select pass or fail as the status. Utilize the Notes section to enter any additional information necessary.

9. Adjusting Sample Package

The test sample package must be reduced by the portion of the sample that was used in the testing process. *Package Adjustments* can be done three ways: manually as described below, via CSV file, or via API by a LIMS. See Section 13.2 for details on using a CSV file to record *Package Adjustments*.

On the *Packages* grid, highlight the sample to be adjusted and select the *Adjust* button. On the *Adjust Package* window:

Enter the package tag number for the test sample needing to be adjusted.

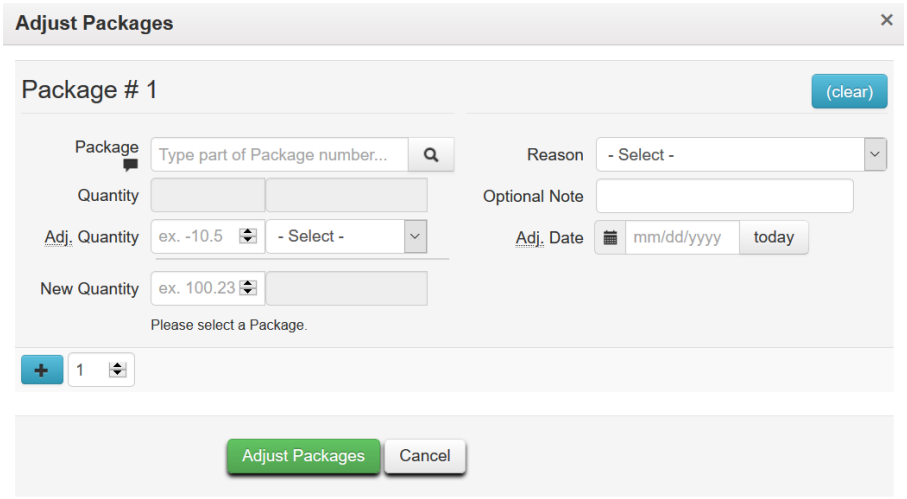
Enter the portion of the sample used during the testing process in the *Adj. Quantity* field as a negative number.

Select a *Reason* of *Sample Tested* from the drop-down menu.

Enter an *Optional Note* if needed.

Select the Adj. Date (Adjustment Date).

Click the *Adjust Packages* green button.



A laboratory shall retain the remaining sample amount, consisting of any portion of a test sample that was not used in the testing process. The remaining sample shall be kept until the testing facility needs to destroy it.

The ability to adjust a sample can also be done via csv file and API as well.

10. Finishing Sample Package

After retaining the remaining portion of the sample not used during analyses, a testing facility shall physically destroy the remainder of the test sample.

In Metrc, the remaining sample should be adjusted to a quantity of zero, finishing the package.

This can be accomplished in a single action on the *Packages* grid by highlighting the sample to be adjusted/finished and selecting the *Adjust* button. On the *Adjust Package* action window:

Enter the remaining quantity of the sample in the *Adj. Quantity* (Adjust Quantity) field as a negative number OR enter 0 (zero) in the *New Quantity* field.

Select a *Reason* of *Waste (Unusable Product)* from the drop-down.

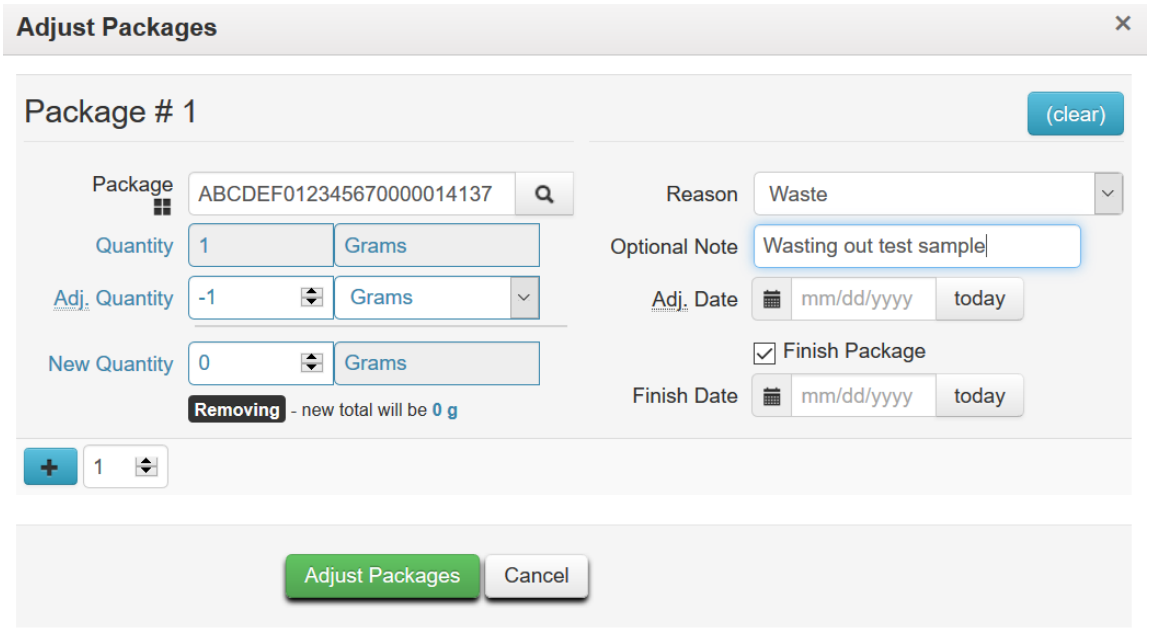
Select the *Adj. Date* (*Adjustment Date*).

Enter an *Optional Note,* if needed.

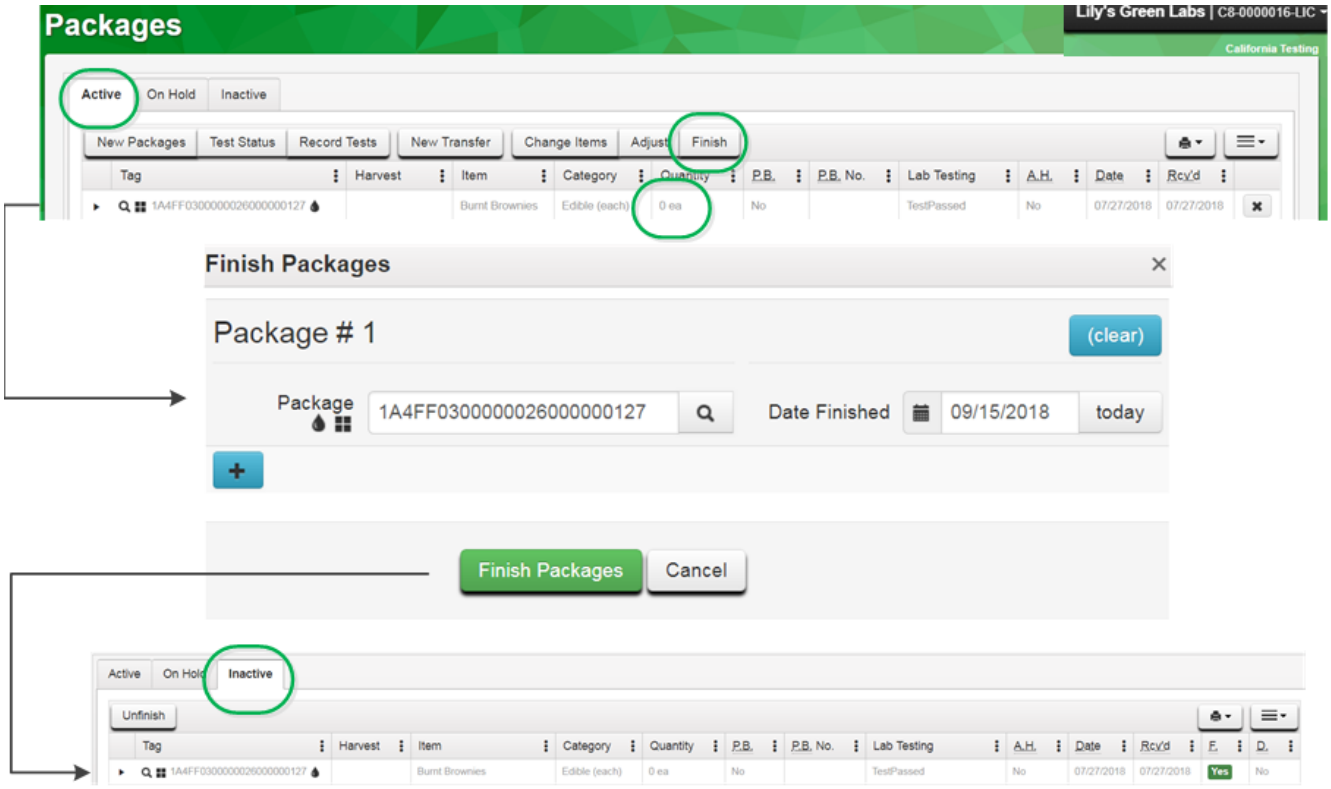
Check the *Finish* checkbox.

Enter the *Finish Date*.

Click the *Adjust Packages* button.



When ready, the *Finish* button can be selected from the *Packages* page to move the package to the *Inactive* tab.



11. CSV Imports

Testing Facilities can upload .CSV files for Lab Testing Results and Package Adjustments.

13.1 Importing Lab Results

Testing facilities have the option to input testing results directly into Metrc, via a .CSV file. As with Package Adjustments, a .CSV upload file *must* be set up in a specific format to facilitate successful upload. Please see the information below for field names and explanation of format.

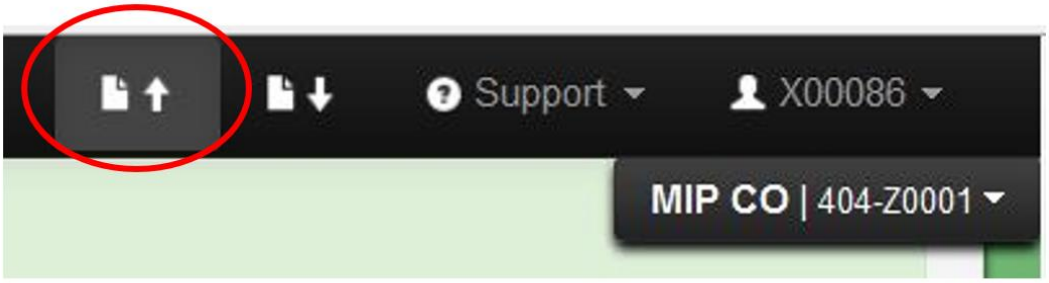
Testing Results CSV Format
-Fields: ResultDate,Label,LabTestTypeName,Quantity,Passed,Notes
-Example: 2015-12-15,ABCDEF012345670000000001,THCa,3,True,3 mg/g

Field	Format	Description
Result Date	YYYY-MM-DD	US Short Date or ISO 8601 Date
Label	Alphanumeric (24)	Package Tag's ID
Lab Test Type Name	Alphanumeric	
Quantity	Numeric	
Passed	Boolean	"True" or "False"
Notes	Alphanumeric	

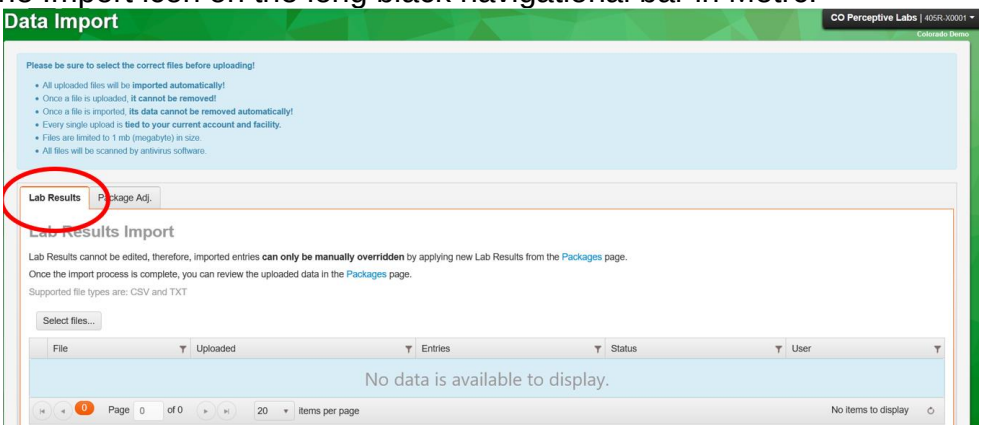
Below is an example of how to set up the csv file in Excel. There should be no headers.

01/01/2021	ABCDEF012345670000000001	THC (%) Raw Plant Material	13.6	TRUE	OK
01/01/2021	ABCDEF012345670000000001	THCA (%) Raw Plant Material	13.6	TRUE	OK
01/01/2021	ABCDEF012345670000000001	CBD (%) Raw Plant Material	13.6	TRUE	OK
01/01/2021	ABCDEF012345670000000001	CBDA (%) Raw Plant Material	13.6	TRUE	OK

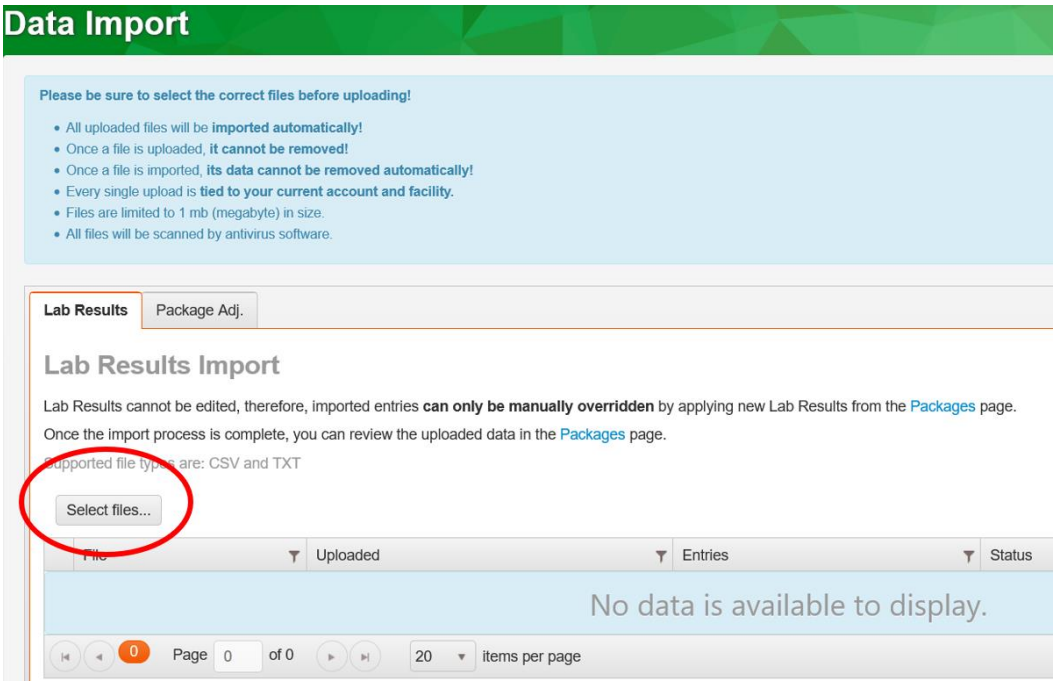
Importing a Lab Results CSV file in Metrc



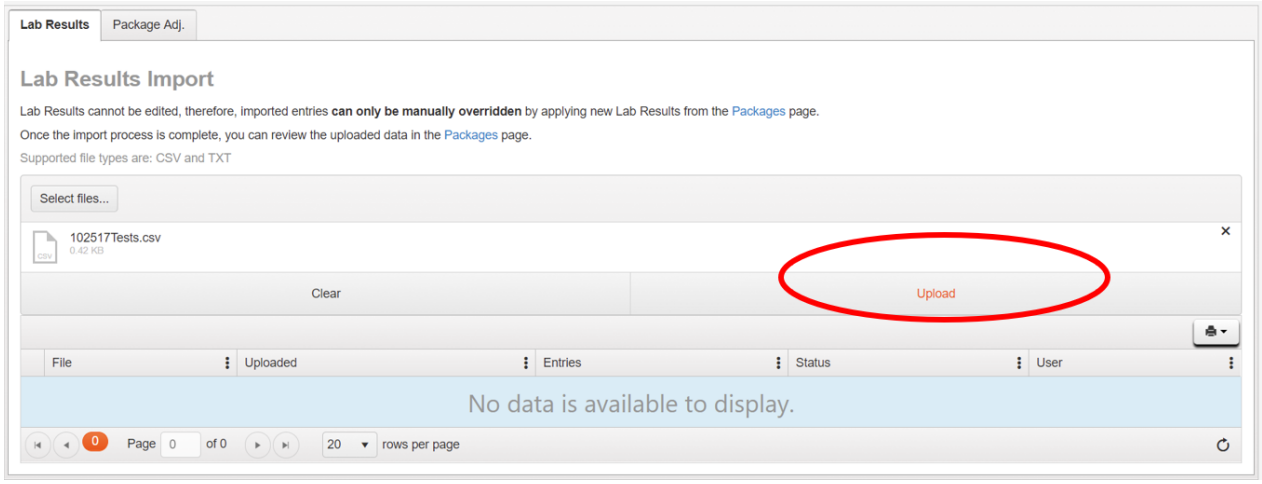
Select the Import icon on the long black navigational bar in Metrc.



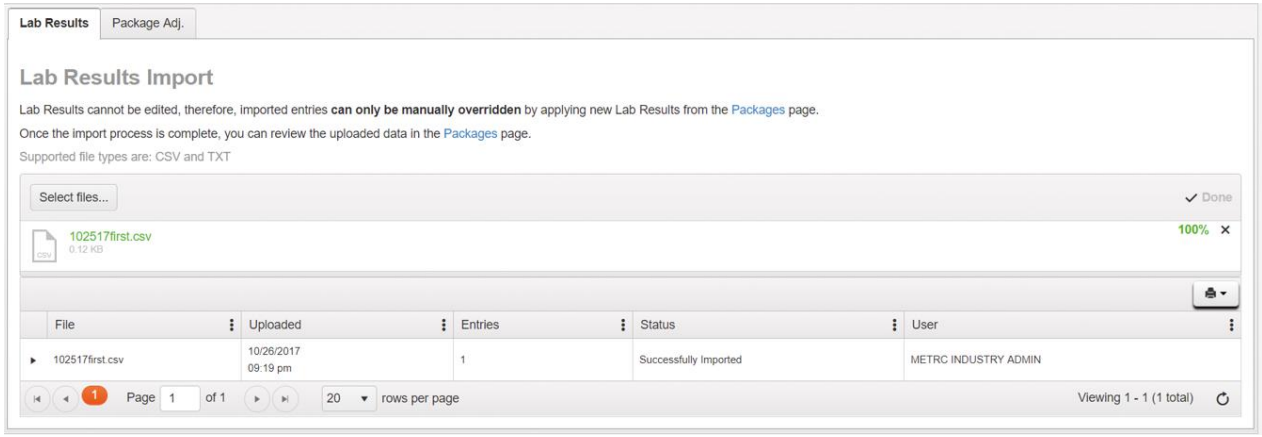
Once on the Data Import screen, select the Lab Results tab. Then click the “Select files…” button. Then you will need to find where the file is located on your computer.



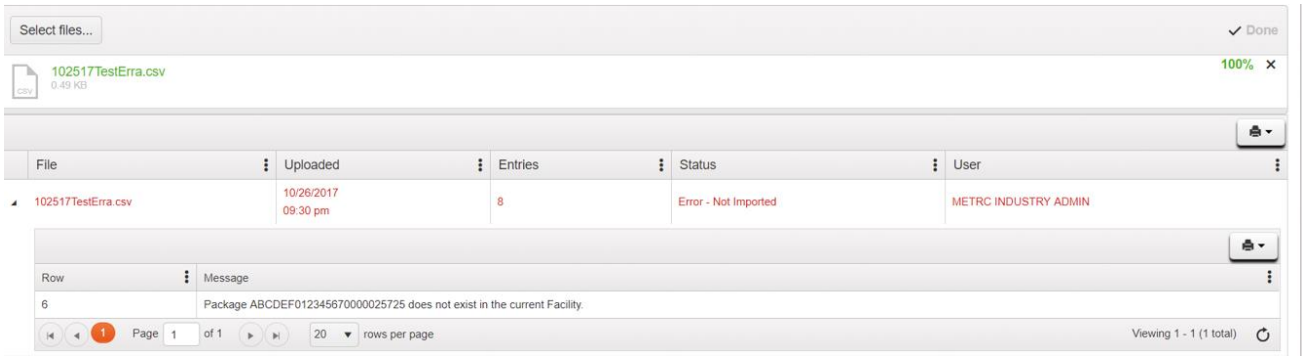
Once the file has been selected, then click the “Upload files” button.



If import is successful, the file name is in a grid that shows the status as Successfully Imported.



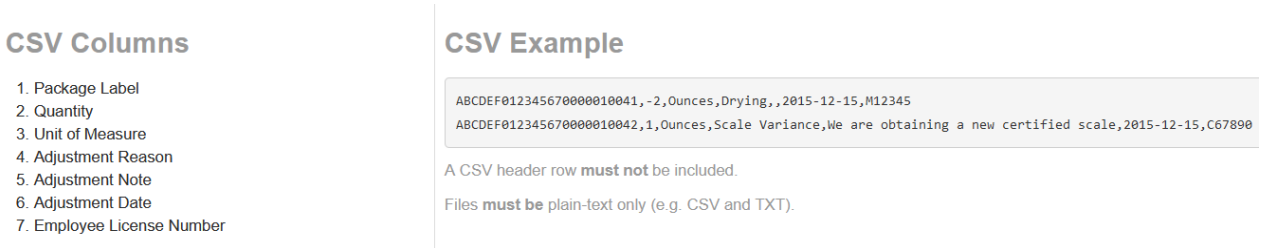
If the import is Not Successful, the file name will be in a grid that shows the status as Error – Not Imported. The arrow (caret) to the left of the file name can be selected and will drop down to show the details as to why the import is not successful.



13.2 Importing Package Adjustments

Licensees have the option to input Package Adjustments directly into Metrc, via a .CSV file. As with Testing Results, a .CSV upload file *must* be set up in a specific format to facilitate successful upload. Please see the information below for field names and explanation of format.

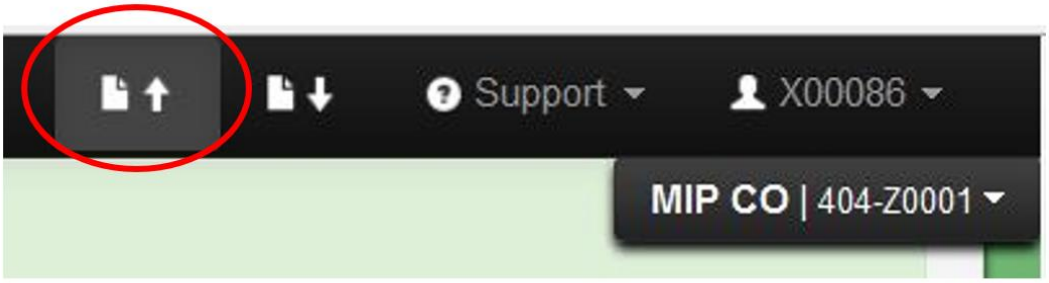
Field	Format	Description
Package ID	Alphanumeric (24)	Package Tag's ID
Quantity	Decimal (+/-)	Numeric amount to affect the Package's quantity
Unit of Measure	Alpha	One of the following: • Each • Ounces • Grams • Pounds
Adjustment Reason	Alpha	One of the following: • Contaminant Testing • Drying • Entry Error • Package Material • Potency Testing • Scale Variance • Spoilage • State Mandated Destruction • Theft • Waste * The above list is subject to change with, or without notice
Notes:	Alphanumeric	Notes associated with adjustment
Adjustment Date	MM/DD/YYYY or YYYY-MM-DD	US Short Date or ISO 8601 Date
Employee Identification Number	Alphanumeric	Employee Identification Number of employee responsible for the adjustment



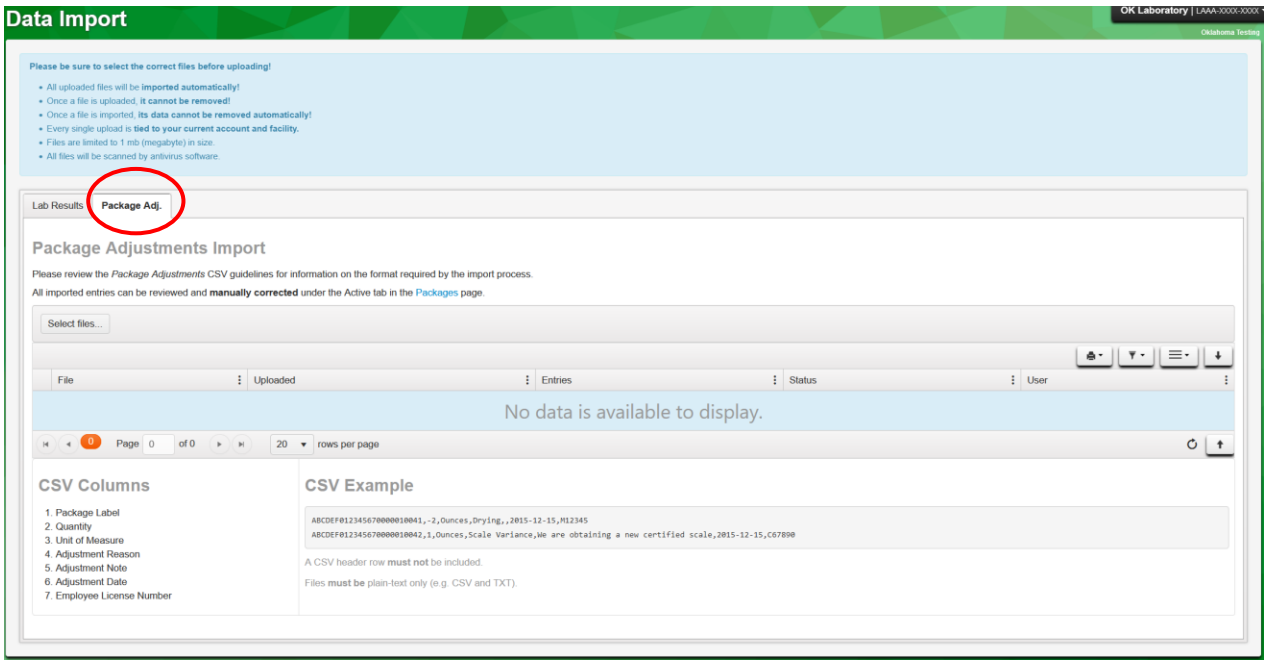
If you have a LIMS System, then that system can help you to be able to export the proper file format out of your LIMS System. Once that is updated to export a Package Adjustments CSV, you will be able to simply grab that file and import it into Metrc.

Importing a Package Adjustment CSV file in Metrc

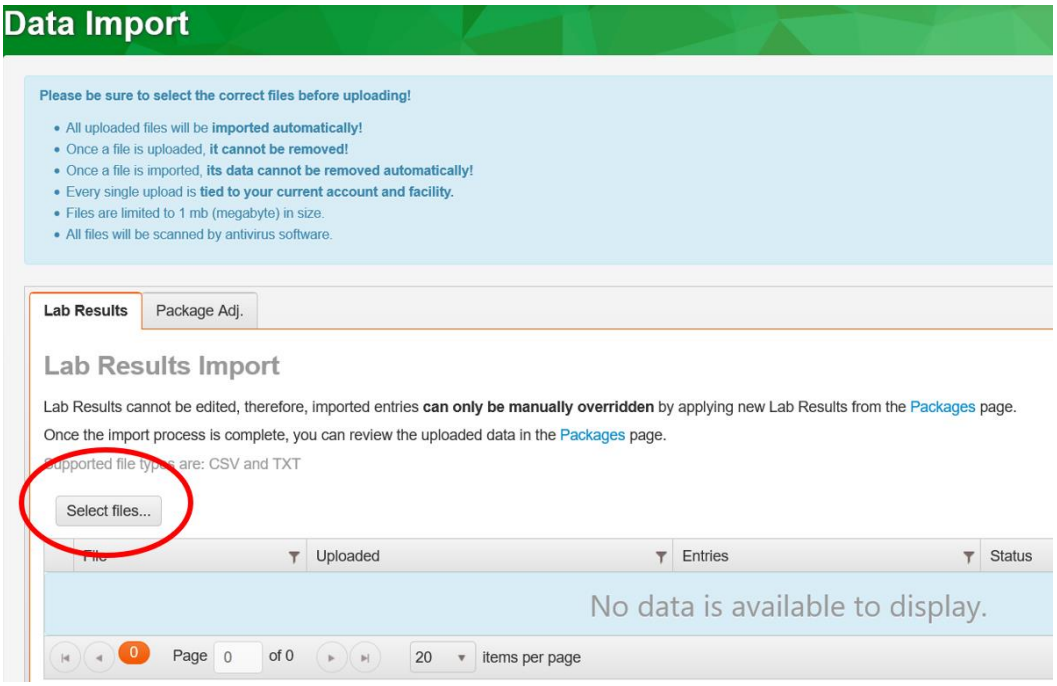
Select the Import icon on the long black navigational bar in Metrc.



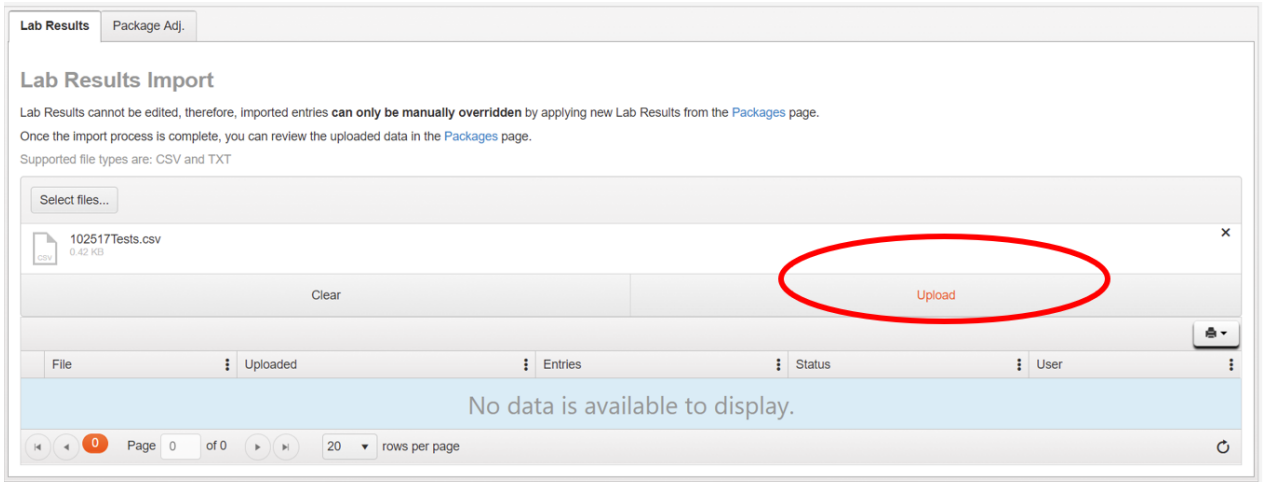
Once on the Data Import screen, select the Package Adj. tab.



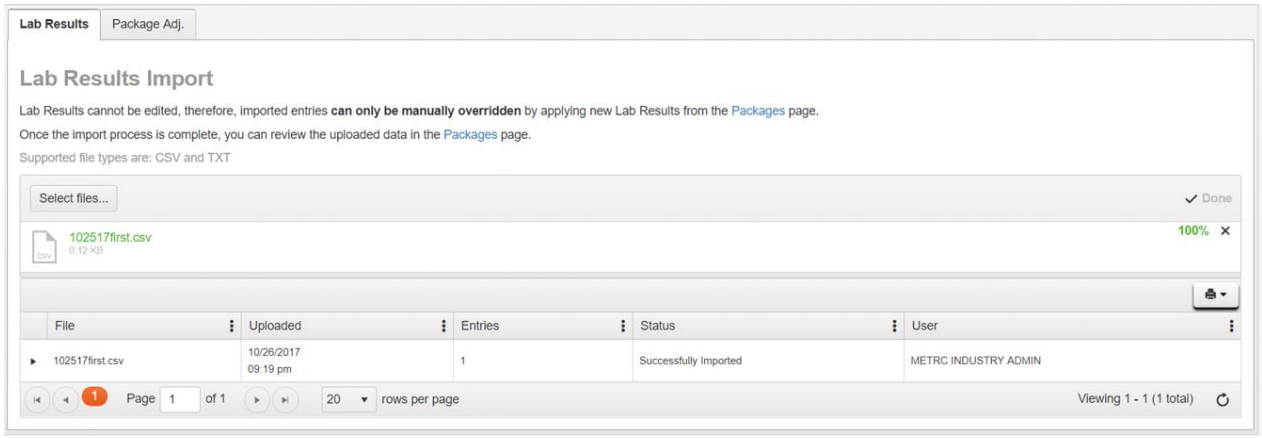
Then click the “Select files…” button. Then you will need to find where the file is located on your computer as shown below.



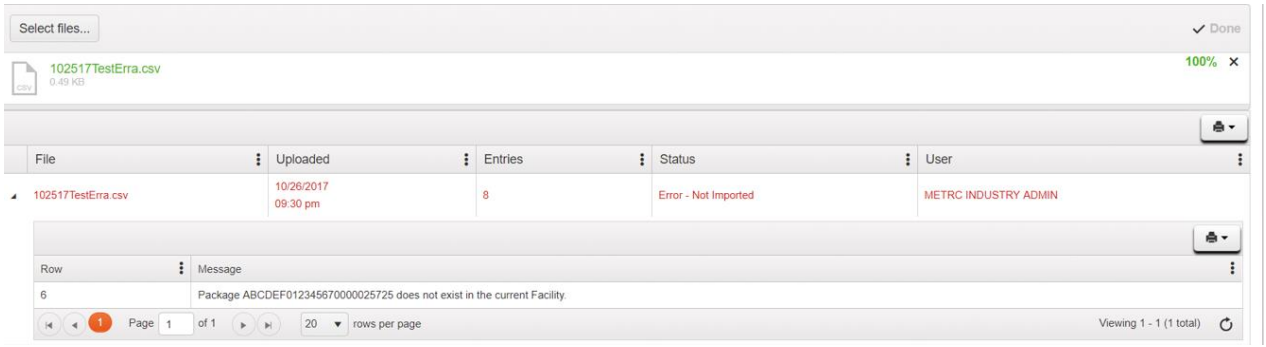
Once the file has been selected, then click the “Upload files” button.



If import is successful, the file name is in a grid that shows the status as Successfully Imported as shown below.



If the import is Not Successful, the file name will be in a grid that shows the status as Error – Not Imported. The arrow (caret) to the left of the file name can be selected and will drop down to show the details as to why the import is not successful.



Please note:

- **<u>The CSV import will be rejected if</u>**:
  - Any Package included in the CSV is not part of your Facility
  - Any Unit of Measure doesn't match the Package's type (i.e., Each vs Ounces)
  - The Adjustment Reason doesn't match an existing entry
  - The Adjustment Date is in an invalid format
  - The Employee Identification Number isn't valid in the State's record
- Any files uploaded will be automatically imported!
- Once a file is uploaded, it cannot be removed!
- Every upload is tied to your account!
- Files are limited to 1 MB (megabyte) in size
- All files will be scanned by antivirus software

12.Metrc Support

Resource Material

- Montana State Supplemental Guide
- Metrc Manual/User Guide
- MT Testing Facility User Guide

Interactive Support

- Email - support@metrc.com
- Support line - 877-566-6506
    - Monday - Friday: 8 am - 7 pm MTN
    - Saturdays: 8 am - 6 pm MTN
    - Sundays: Voicemail & Email Only

Training - sign up through the Metrc website (www.metrc.com/Montana) or the Support Tab on the long black navigation bar in Metrc.

To sign up for training from your Metrc account:

- Click on Support menu from the top navigation bar.
- Click on the Sign up for Training choice under the Support menu.
- Click on the date for the specific training desired, then register for the training class.

To sign up for training from www.metrc.com/Montana:

- Click on the Training Sign Up green button.
- Click on the date for the specific training desired, then register for the training class.