

Testing Lab User Guide Montana

METRC Lab User Guide



Franwell, Inc. 2017

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Packages

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



- The Package Tag is made specifically for packaging and transfer use.
- The Package Tag is perforated with the upper and lower information being the same
- The Package Tags are colored coded Yellow for Medical.
- The Testing Lab does not take any portion of the package tags from the batch packages that are being sampled from.
- The Package Tag breaks into 2 pieces:
 - The Upper Portion (larger) stays with the package
 - The Lower Portion (smaller) can be used on intake paperwork at the Testing Lab.



Terminology

- Harvest – A group of plants that were harvested on the same day, cultivated & cured under uniform conditions.
- Harvest batch - a group of plants that were harvested within 72 hours, cultivated & cured under uniform conditions.
- Harvest Lot Package– a package of no more than 5 pounds (lbs) of Usable Marijuana that have been grown, harvested and cured under uniform conditions. This includes dried leaves and flowers of the cannabis plant.
- Production Batch – 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.
- Test Sample – 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

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 Producer license
 - Lab Representative goes to licensee's facility and samples
 - Lab Rep physically creates test sample(s) and gives weight information to licensee
 - Licensee electronically creates Test Sample(s) in METRC from their harvest lot package.
 - 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 the Retention Sample (as a regular package) in METRC from their Batch Packages
 - Licensee gives physical Retention Sample package tag to the Lab Rep
 - Lab Rep sticks a portion of the Retention Sample package tag to the correct Retention Sample container
 - Licensee electronically creates Transfer/Manifest in METRC to manifest all test samples to the Testing Lab (Not Retention Samples – those are kept at licensee's location)
 - 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 be entered in METRC unless otherwise instructed by the state.
- Testing Requirements per Product Type:

Final Product Type	Testing Requirements
Usable Marijuana (Buds & Shake/Trim)	Moisture Content Potency Filtration & Foreign Matter Microbials Heavy Metals – Random Pesticides <u>Mycotoxins</u>
Concentrate/Extract	Potency Heavy Metals – Random Microbials Mycotoxins Residual Solvents Pesticides
Marijuana-infused Product	Potency Microbials

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.
- A test sample package cannot be discontinued unless the sample package was created by that specific 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 brought back to life.
- When adjusting a package, you must use the appropriate adjustment reason set up by the state.
- In order to send a Sub-Contracted sample for testing, a new sub-sample package must be pulled from the original test sample package at the testing lab and get a new package tag from the testing labs' inventory.
- When a sub-sample is created, Test results must be entered by the Sub-Contracted Testing Facility.
- R&D Test Samples results will be entered into METRC unless otherwise instructed by the state.

Quality Assurance Sampling Protocols

Refer to Montana Marijuana Program Quality Assurance and Testing Protocols.

Quality Assurance Testing

Refer to Montana Marijuana Quality Assurance and Testing Protocols.

Creating Sub-Contracting Samples Packages from Existing Test Sample Package(s)



Sub-Contracted Test Samples are only allowed under specific situations as permitted by the state. Samples can only be subcontracted to labs located in the State of Montana who are licensed by the State of Montana Medical Marijuana Program. All sub-contracted samples require special permission from the state and will only be approved in a special circumstance. Only one Sub-Contracted test sample 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 [Type part of the Tag number...]

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

3

are currently available for use.

Item

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

Quantity

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.

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

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 in order for the system to calculate the total quantity correctly. This will help eliminate mistakes in calculating the true weight/count of your new package.

7

Package Date

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

Today button

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

9

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.

10

Package #1

Package # 1

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

11

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.

12

Quantity

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.

13

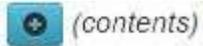
Unit of Measure

Grams

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.

14

Add button



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

15

(clear) button



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

16

Create Packages button



Create Package button is used to create the new sub-sample package(s) that need to be created.

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.

Transfers - Keep in Mind

- A transfer must be created anytime a package or test sample moves from one physical location or license number to another.
- A Manifest Transfer is the only way to electronically move from one licensee's inventory to a testing lab's inventory.
- To print a manifest, click on the manifest number to highlight in orange, then click on View Manifest button. Then 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, 1/4 or 3/4 of a package).
- A transfer can be rejected by package or completely.
- A rejected 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 package, you will have the opportunity to report a new weight or a more scientific weight (up to 4 places after the decimal).
- You must receive the transfer in METRC as soon as you as verify the count or weight of the product being received.
- If you have any question at all about the transfer, you need to reject it.

Testing Types

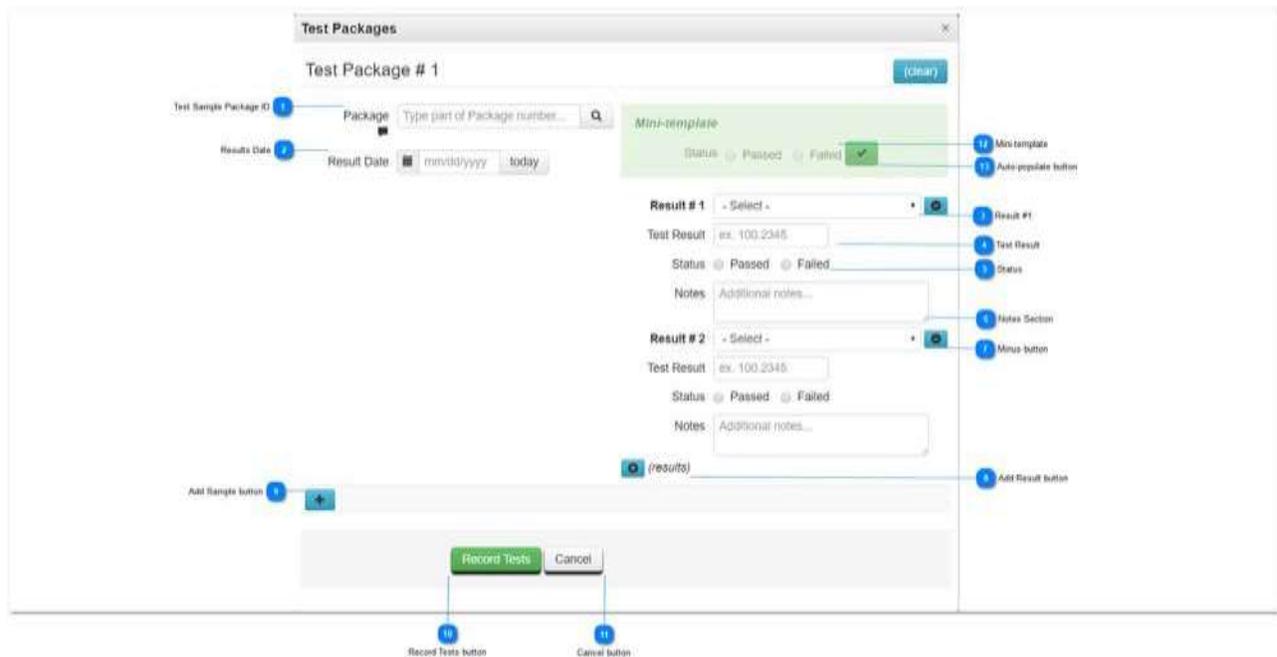
The State sets up the criteria of what test types are required for testing in METRC.

Lab Test Type	Lab Test Type	Lab Test Type
Abamectin	Heavy Metals	Spiromesifen
Acequinocyl	Hepantes	Spirotetramat
Acetone	Hexanes	THC
Aflatoxin	Imazalil	THCa
Benzene	Imidacloprid	Toluene
Bifenthrin	Inorganic arsenic	Total CBD
Bifenzate	Isopropanol (2-propanol)	Total THC
Butanes	Lead	Trifloxystrobin
Cadmium	Mercury	Xylene
CBD	Methanol	
CBDA	Microbiological	
Chlormequat chloride	Moisture analysis	
Chloroform	Myclobutanil	
Cyclohexane	Ochratoxin A	
Cyfluthrin	Paclobutrazol	
Daminozide	Pentanes	
Dichloromethane	Pesticide	
E. Coli	Propane	
Ethyl acetate	Pyrethrins	
Etoxazole	Residual Solvent	
Fenoxycarb	Salmonella	
Filth and Foreign Matter	Spinosad	

ALL testing will be entered into METRC including passing and failing results. 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 feature is especially helpful if a test result is called into question at a later date. This is optional.

Entering Test Results



1

Test Sample Package ID

Package Type part of Package number...

Test Sample Package ID is the test sample package 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.

3

Result #1

Result # 1 - Select -

Result #1 is used to choose the specific test type that was tested and those specific results which need to be entered.

4

Test Result

Test Result ex. 100.2345

Test Result is used to enter a specific quantity or result for the test type being entered. The test results box can have whole numbers or numbers with up to 4 places after the decimal. This number should be specific to what the test results yielded.

5

Status

Status Passed Failed

Status is used to choose a Passed or Failed result for the specific test type being entered which passed or failed testing.

6

Notes Section

Notes

Notes section is used to enter any supporting information or documentation regarding test results including internal testing number, break down information regarding the result, correction information in the case of correcting incorrect results entered earlier, etc.

7

Minus button



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

8

Add Result button



Add Result button is used to add an additional Test Result if necessary. A testing facility can add as many results as necessary to complete that specific testing that was done on a specific test sample.

9

Add Sample button



Add Sample button is used to enter test results on another test sample package simultaneously.

10

Record Tests button



Record Tests button is used to record the specific test results that have been entered by a testing facility to the specified test samples listed above.

11

Cancel button



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

12

Mini-template

Status Passed Failed

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).

13

Auto-populate button



Auto-populate button is used to Auto-populate the Passed or Failed status to the multiple test results being entered below.

Test Results per Category

Test Category	How to Enter Result	If Result is Failure
Moisture Content	Select “Moisture Content”, select pass or fail as the status, then enter the percentage of the value found during analysis	No additional information required, if fail then select “Failed” and enter the specific percentage of the Moisture Content that failed
Potency	Result #1 Select “THC (%)” and select pass or fail as the status, then enter the percentage of THC. Result #2 Select “THCa (%)” and select pass or fail as the status then enter the percentage of THCa. Result #3 Select “Total THC (%)” and select pass or fail as the status then enter the percentage of Total THC. Result #4 Select “CBD (%)” and select pass or fail as the status then enter the percentage of CBD. Result #5 Select “CBDa (%)” and select pass or fail as the status then enter the percentage of CBDa. Result #6 Select “CBG (%)” and select pass or fail as the status then enter the percentage of CBG.	No Additional information required, if fail then select “Failed” and enter the specific percentage of the Cannabinoid that failed.
Foreign Matter and Filth Inspection	Result #1 Select “Foreign Matter & Filth” and select pass or fail as the status then in the Notes Section, enter any findings found during the visual inspection of the product being analyzed.	No additional information required, if fail then select “Failed” and enter in the Notes Section the specific information that caused the Foreign Matter & Filth Inspection to fail.
Microbiologicals	Result #1 Select “Microbiologicals” and select pass or fail as the status. (If fail, see Result#2. If pass and none detected, select pass and in the Notes Section enter None Detected.) Result #2 Select “Aflatoxin” and select Failed as the status, then enter the Aflatoxin B1, B2, G1, G2 and enter the µg/kg detected if applicable. Result #3 Select “E. Coli” and select pass or fail as the status then enter the CFU/g detected if applicable. Result #4 Select “Ochratoxin A” and select pass or fail as the status then enter the CFU/g detected if applicable. Result #5 Select “Salmonella” and select pass or fail as the status then enter the CFU/g detected if applicable. Result #6 Select “Total Yeast & Mold Count (CFU/g)” and select pass or fail as the status then enter the CFU/g detected if applicable.	If coliforms or µg/kg are detected, select the Microbiological Contamination found and select “Failed” as the status, then enter the CFU/g or µg/kg detected.
Water Activity	Select “Water Activity (Aw)” and select pass or fail as the status, then enter the Aw detected.	If fail, select “Failed” as the status, then enter the Aw detected.
Heavy Metals – Random	Result #1 Select “Heavy Metals” and select Pass or fail as the status. (If fail, see Result #2. If pass or none detected, select pass and in the Notes Section enter “None Detected”.) Result #2 Select “Cadmium” and select fail as the status, then enter the PPM detected if applicable Result #3 Select “Inorganic Arsenic” and select fail as the status, then	If Heavy Metals are detected, select the Heavy Metal detected then select “Failed” as the status, and enter the PPM of that Heavy Metal

Test Category	How to Enter Result	If Result is Failure
	<p>enter the PPM detected if applicable.</p> <p>Result #4 Select "Lead (PPM)" and select fail as the status, then enter the PPM detected if applicable.</p> <p>Result #5 Select "Mercury (PPM)" and select fail as the status then enter the PPM detected if applicable.</p>	<p>detected. This should be done for each Heavy Metal detected.</p>
Residual Solvents	<p>Result #1 Select "Residual Solvents" and select Pass or fail as the status. (If fail, see Result #2. If pass or none detected, select pass and in the Notes Section enter "None Detected".)</p> <p>Result #2 Select "Acetone" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #3 Select "Benzene (PPM)" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #4 Select "Butanes (PPM)" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #5 Select "Chloroform" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #6 Select "Cyclohexane" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #7 Select "Dichloromethane" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #8 Select "Ethyl Acetate" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #9 Select "Heptanes" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #10 Select "Hexanes" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #11 Select "Isopropanol (2-Propanol)" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #12 Select "Methanol" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #13 Select "Propanes" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #14 Select "Pentanes" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #15 Select "Toluene" and select pass or fail as the status, then enter the PPM detected if failed.</p> <p>Result #16 Select "Xylenes" and select pass or fail as the status, then enter the PPM detected if failed.</p>	<p>If Residual Solvents are detected select "Residual Solvents" then select Fail.</p> <p>Then select the Solvent detected then Select "Failed" as the status, and enter the PPM of that Solvent detected. This should be done for each Solvent described.</p>
Pesticides	<p>Result #1 Select "Pesticides" and select pass or fail as the status. (If fail, see Result #2. If pass and none detected, select pass and in the Notes Section enter None Detected.)</p> <p>Result #2 Select the Analyte that failed, then select fail and enter the specific value detected as parts per million in the quantity field. (If more than one Analyte failed, then enter each one as its own result.) This would include the following Analytes: Abamectin, Acequinocyl, Bifenazate, Bifenthrin, Chlormequat Chloride, Cyflurthrin, Daminozide, Etoxazole, Fenoxycarb, Imazalil, Imidacloprid, Myclobutanil, Pacllobutrazol, Pyrethrins, Spinosad, Spiromesifen, Spirotetramat, and Trifloxystrobin.</p>	<p>If a specific analyte is detected, select the Analyte detected then select "Failed" as the status and enter the PPM of that Analyte detected. This should be done for each Analyte Detected.</p>

.CSV Imports

Testing Labs can upload .CSV files for Lab Testing Results and package adjustments.

Importing Lab Results

Testing facilities now have the option to input testing results directly into METRC, via a .CSV file. As with Package Adjustment, 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

-Notes is an *optional* field. It can be left blank.

-Example: 2015-12-15,ABCDEF012345670000000001,Total THC,20.3,True,23.3 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	

Importing Package Adjustments

Licensees have the option to upload 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: <ul style="list-style-type: none"> • Each • Ounces • Grams • Milligrams • Kilograms • Pounds
Adjustment Reason	Alpha	One of the following: <ul style="list-style-type: none"> • Drying • Entry Error • License to License Transfer • Scale Variance • Spoilage • Theft • Waste *The above list is subject to change with, or without notice
Adjustment Date	MM/DD/YYYY or YYYY-MM-DD	US Short Date or ISO 8601 Date
Badge Number	Alphanumeric	Badge Number of employee responsible for the adjustment

The following example shows several lines of a CSV:

```
-1A400000266EF88000004FD,10,Each,"Entry Error",06/17/2014,M12345
-1A400000266EF88000004FE,-1,Ounces,"Drying",06/16/2014,M12345
-1A400000266EF88000004FF,-3,Kilograms,"Waste",06/14/2014,M12345
```

If you have a LMS System, then that system can help you to be able to export the proper file format out of your LMS 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.

Please note:

- **The CSV import will be rejected if:**

- 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 Occupational License 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

Proficiency Testing

Proficiency instructions for METRC will be distributed at a later date.

METRC Support

- Material Support
 - Montana State Supplemental Guide
 - METRC Manual/User Guide
 - METRC Testing Lab User Guide
- Interactive Support
 - Email - support@metrc.com
 - METRC support line - 877-566-6506
 - a. Monday - Friday: 8 am - 7 pm MTN
 - b. Saturdays: 8 am - 6 pm MTN
 - c. Sundays: Voice mail & 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 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 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.