

Maine's Getting Started Guide: Inventory Tracking System

Maine Adult Use Cannabis Program (AUCP)

August 2022



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Overview

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

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

Contact Information



Customer Support:

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



Contact Us:

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

Required Metrc Training

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



state's Adult Use market. Metrc was able to fully implement the system and begin accepting industry users in 60 days. The OCP and Metrc aim to continue to support the growth of Maine's Adult Use market.



WELCOME TO METRC'S TRAINING RESOURCES

If you are new to Metrc and have your license from the state.

NEW BUSINESS TRAINING

If you are already active in Metrc and are looking for additional training.

METRC LEARN

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

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

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

- These webinar-based training classes are offered on-demand basis at: <https://www.metrc.com/partner/maine/>
- 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 by clicking the “Metrc Learn” button .

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

- Personal Email Address (NOT Business Email Address)
- First and Last Name
- License Number/Badge Number

First-Time Metrc Credentialing

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

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

Subject Line: "Requesting ME Credentials"

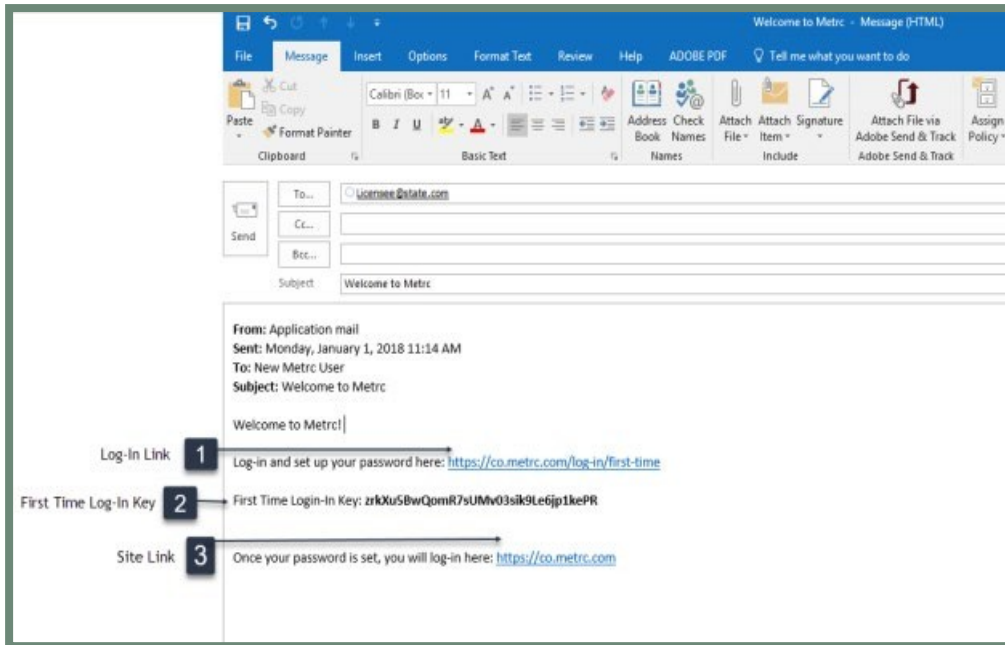
In the body of the email, please include:

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

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

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

Logging into Metrc



Item 1: Login Link

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

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

Item 2: First Time Login Key

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

Item 3: Site Link

<https://ME.metrc.com>

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

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

Creating User Profile

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

Item 1: Full Name

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

Item 2: Email

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

Item 3: Phone Number

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

Item 4: Username

Your username will be prepopulated by the State.

Item 5: Password

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

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

Item 6: Confirm Password

Confirm your chosen password by retyping it in this section.

Item 7: Security Question

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

Item 8: Security Answer

Enter the answer to your chosen security question.

Item 9: Save Profile button

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

Item 10: Undo Changes button

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

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

Adding Employees

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

Item 1: Employee License Number

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

Item 2: Enable Online Access checkbox

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

Item 3: Email

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

Item 4: Home

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

Item 5: Employment

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

Item 6: Permissions

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

Item 7: Facilities

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

Item 8: Add button

Allows you to enter multiple employees at the same time.

Item 9: Create & Save Employees button

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

Item 10: Cancel button

Click here to exit the screen without saving any data.

Item 11: Clear button

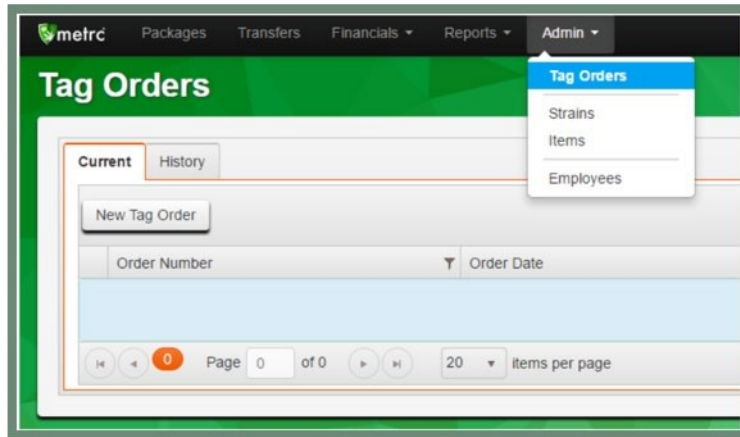
Click here to clear all the information fields without saving.

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

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

Ordering Tags

After being credentialed into Metrc, the first thing you should do is order RFID tags. Tags are printed in Florida and shipped via UPS with a standard shipping time of 5-7 days. Please keep this in mind as you are required to have a sufficient stock of tags on hand and need them to enter your beginning inventory. To order tags, log into your Metrc account and click Tag Orders under the Admin tab.



Once your tags arrive, navigate back into the Tag Orders area to select the “Receive” button to the far right to populate your tags in the system. This button will only appear once your order has shipped. **DO NOT** receive your tags digitally before they physically arrive.

Order Number	Order Date	Status	Total	Paid	Tracking Number	User	
Demo-MA-2018-134-0301	05/14/2018 02:08 pm	Paid	\$35.08	\$35.08		Robert Brown	Invoice
Demo-CO-2018-068-0207	03/09/2018 04:49 pm	Shipped	\$0.00	\$0.00	1A400c0f02tagvbm4vq	DISPENSARY OWNER	Invoice Receive
Demo-CO-2018-068-0208	03/09/2018 04:49 pm	Shipped	\$0.00	\$0.00	1A400h5a81twoc0dp	DISPENSARY OWNER	Invoice Receive

Adding Locations

Location	Location Type	Plant Batches	Plants	Harvests	Packages
Extraction Room	default	Yes	Yes	Yes	Yes
Flower Room A	default	Yes	Yes	Yes	Yes
Flower Room B	default	Yes	Yes	Yes	Yes
Harvest Room	default	Yes	Yes	Yes	Yes
Immature Plant Room	default	Yes	Yes	Yes	Yes
Shelf 1	default	Yes	Yes	Yes	Yes

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

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

Item 1: Location Name

The location name is entered here.

Item 2: Location Type

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

Item 3: Add Button

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

Item 4: Clear Button

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

Item 5: Facilities

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

Item 6: Create Locations

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

Item 7: Cancel

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

Adding Strains

Strain	Testing	THC	CBD	Genetics	Used
April's test strain	ThirdParty	0.3	0.15		No
Cho test	Inhouse	0.2	0.2		No
Maine Chocolate Bear	ThirdParty	0.3	0.05		Yes
Metic Test	ThirdParty	0.3	0.15		Yes

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

The screenshot shows the 'Add Strains' form with the following elements and callouts:

- 1:** Name input field
- 2:** Testing Status dropdown menu
- 3:** THC% input field
- 4:** Indica vs. Sativa slider controls
- 5:** Plus sign button and quantity input field (set to 1)
- 6:** Create Strains button
- 7:** Cancel button
- 8:** Facility selection checkboxes (ME Cultivation, ME Manufacturer, MF Nursery, ME Store, ME Testing)
- 9:** Clear button

A blue informational box contains the following text:

Please report THC potency as a percentage of the overall weight.
 This means that if a particular strain tested as having 15% THC potency, then every gram of dried flower of that strain has 0.15 grams of THC. The reality is that potency can drastically change even between a single plant or from plant to plant. So, the percentage that should be entered into micro® would be the average potency percentage from all tests in the prior two years. If no tests have been conducted please use your best estimate.

Item 1: Strain Name

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

Item 2: Testing Status

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

Item 3: THC and CBD Content

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

Item 4: Indica vs. Sativa

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

Item 5: Add More Strains

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

Item 6: Create Strains button

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

Item 7: Cancel button

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

Item 8: Additional Facilities

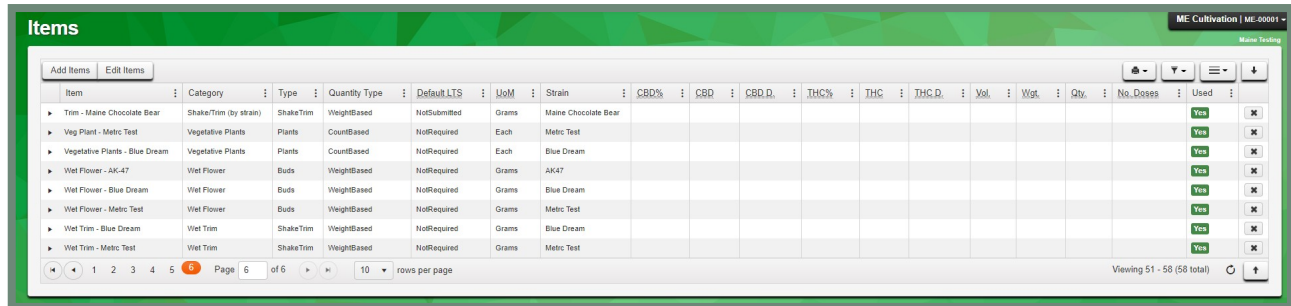
If your organization has multiple facilities, you can add strains to one or more at the same time using the relevant checkmark boxes. Use the "Check All" or "Check None" boxes to select all or none of the facilities, as needed.

Item 9: Clear Button

Use this button to clear all data without saving.

Adding Items

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



Item	Category	Type	Quantity Type	Default LTS	UoM	Strain	CBD%	CBD	CBD.D	THC%	THC	THC.D	Vol	Wgt	Qty	No. Doses	Used
Trim - Maine Chocolate Bear	Shake/Trim (by strain)	Shake/Trim	WeightBased	NotSubmitted	Grams	Maine Chocolate Bear											Yes
Veg Plant - Metrc Test	Vegetative Plants	Plants	CountBased	NoRequired	Each	Metrc Test											Yes
Vegetative Plants - Blue Dream	Vegetative Plants	Plants	CountBased	NoRequired	Each	Blue Dream											Yes
Wet Flower - AK47	Wet Flower	Buds	WeightBased	NoRequired	Grams	AK47											Yes
Wet Flower - Blue Dream	Wet Flower	Buds	WeightBased	NoRequired	Grams	Blue Dream											Yes
Wet Flower - Metrc Test	Wet Flower	Buds	WeightBased	NoRequired	Grams	Metrc Test											Yes
Wet Trim - Blue Dream	Wet Trim	Shake/Trim	WeightBased	NoRequired	Grams	Blue Dream											Yes
Wet Trim - Metrc Test	Wet Trim	Shake/Trim	WeightBased	NoRequired	Grams	Metrc Test											Yes

When adding Items into Metrc, please keep in mind:

- The “Item” name should identify the product that will be packaged and distributed to Consumers.
- The Item name should not simply identify the Category; it should describe the specific item that is being packaged. The name for an item from any Strain Specific category should include the Strain Name (i.e. Buds - Blue Dream). The item names should not include the potency content of the item.
- Items must be created for each individual facility.
- As you create your Item, you will also identify the Category it belongs to. Categories available in the dropdown menu are populated by the State. Categories facilitate the tracking of product in the system by like groups.
- The facility packaging the product is responsible for naming the Item; the Item name is carried with the product through the distribution chain.
- Once Items are created, they will be available in the Items dropdown menu in the packagescreen.

Item Categories are defined by the State and are listed below with additional requirements:

Note: Please keep in mind that the State may change, add, or remove Item categories.

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

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

Adding Items

The screenshot shows a web form titled "Add Items" with a close button (X) in the top right. The form contains the following elements:

- Item # 1**: A label for the first item, with a **(clear)** button to its right (callout 4).
- Name**: A text input field (callout 1).
- Unit of Measure**: A dropdown menu (callout 3).
- Category**: A dropdown menu with "- Select -" (callout 2).
- +**: A blue button with a plus sign (callout 5).
- Informational Box**: A light blue box with the text: "Why is there no multi-Facility create such as that available in Employees, Strains, and Rooms? Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create items in multiple Facilities at the same time."
- Create Items**: A green button (callout 6).
- Cancel**: A grey button (callout 7).

Item 1: Name

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

Item 2: Category

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

Item 3: Unit of Measure

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

Item 4: Clear button

Select this button to clear all entered data without saving.

Item 5: Add button

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

Item 6: Create Item button

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

Item 7: Cancel button

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

Definitions

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

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

Seedling: A seedling is a cannabis plant that is:

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

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

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

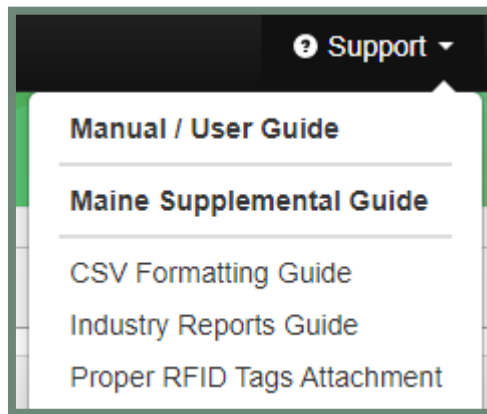
Transport Manifest: A record, either paper or electronic, required by the Department for a licensed facility to document the possession and transfer of the cannabis or cannabis product on the premises, tracking all inventory, acquisition, sales, and waste disposal.

Additional Training & Support

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

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

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



Metrc Customer Support

<http://support.metrc.com>

support@metrc.com

1-877-566-6506

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