MAINE STATE LEGISLATURE

The following document is provided by the
LAW AND LEGISLATIVE DIGITAL LIBRARY
at the Maine State Law and Legislative Reference Library
http://legislature.maine.gov/lawlib

State of Maine
Metrc User Workgroup

Report to the Maine State Legislature Pursuant to Public Law 2022, ch. 628

Maine Department of Administrative and Financial Services
Office of Cannabis Policy

———

January 3, 2023

Contents

I. Background

During the Second Regular Session of the 130th Maine Legislature, several pieces of legislation related to adult use cannabis were considered by the Joint Standing Committee on Veterans and Legal Affairs (VLA). Among the bills reported out of that committee, and subsequently enacted by the legislature, was *An Act To Allow the State's Adult Use Marijuana Tracking System To Track Plants and Products by Group,* [PL 2021, ch. 628](#).

This law tasked the Department of Administrative and Financial Services (DAFS), Office of Cannabis Policy (OCP) with gathering and synthesizing direct user feedback from members of the adult use cannabis industry on Metrc, the State's software vendor for cannabis and cannabis product inventory tracking. To accomplish this task, OCP convened the Metrc User Workgroup to solicit feedback across several meetings with the goal of assisting OCP in determining what changes and updates were needed in Metrc to help streamline the system for Maine cannabis industry users.

PL 2021, ch. 628 also required that the State's tracking system allow cannabis plants to be tracked by group at the cultivation stage and upon transfer from a cultivation facility to another licensee. OCP continues to work with Metrc to implement a solution for this process, commonly referred to as "batch tracking." Therefore, the discussions and findings of the Metrc User Workgroup focused more on other software limitations and desired system enhancements.

Metrc has been Maine's cannabis tracking system vendor since February 2020. They were awarded the contract in response to RFP 201903049, issued by the State of Maine in March 2019, which sought proposals to provide a cannabis seed-to-sale tracking system through a Software as a Service (SaaS) agreement. The six-year agreement with Metrc was critical to OCP's ability to establish the regulated market for adult use cannabis in 2020 and has remained vital to the continued administration of Maine's regulated adult use cannabis marketplace.

While the State of Maine is the contract holder with Metrc, members of Maine's adult use cannabis industry are the primary users of the software and continuously use it to update their inventory as required by law. This process, better known as "track-and-trace," is a hallmark of any well-regulated cannabis program. As such, OCP sought applications directly from the industry for the 2022 Metrc User Workgroup to formalize the solicitation of feedback from stakeholders mandated by the 130th Legislature.

OCP respectfully submits this report in satisfaction of the reporting requirements of that mandate.

II. Executive Summary

Metrc is a cannabis regulatory tool that uses advanced software, radio-frequency identification (RFID) technology, and a secure database to track-and-trace cannabis from growth, harvest, and processing to testing, transport, and sale. Metrc's inventory tracking software and RFID-enabled tags allow the Office of Cannabis Policy (OCP) to maintain full supply-chain visibility for Maine's Adult Use Cannabis Program. This is an integral part of OCP's mission to ensure the health and safety of all Mainers by effectively and responsibly licensing and regulating cannabis establishments.

On July 19, 2022, OCP released a call for applications for interested parties to apply for the Metrc User Workgroup constituted to satisfy the requirements of PL 2021, ch. 628 enumerated above. The Office received a total of 19 applications from licensees looking to engage on issues related to the State's cannabis inventory tracking system. Following the application process, OCP held four virtual meetings with the members of the Metrc User Workgroup between the months of August and November 2022 on the following dates and times:

- **Tuesday, August 23, 2022, 2-4PM**
- **Tuesday, September 13, 2022, 2-4PM**
- **Tuesday, October 11, 2022, 2-4PM**
- **Tuesday, November 8, 2022, 2-4PM**

Each meeting of the Workgroup was conducted virtually and live streamed through OCP's YouTube channel. All meeting materials and recordings were also made available on the OCP website.

Former OCP Director Erik Gundersen opened the series of meetings by expressing the importance of a functioning inventory track-and-trace system to a well-regulated program. Director Gundersen also established the importance of hearing from regular Metrc users and thanked the participants for their leadership in the process. He acknowledged that while OCP is fully committed to the process of improving the software, the Workgroup would likely raise issues that may or may not be able to be addressed in the short term.

During the first two meetings, Workgroup members identified specific challenges with the Metrc system and discussed areas for improvement. OCP facilitated further discussion and invited representatives from Metrc to speak directly to the Workgroup on the identified issues during the final two meetings.

This report showcases the recommendations and outcomes from the Metrc User Workgroup, as well as OCP's assessment of those recommendations.

III. Membership

In response to PL 2021, ch. 628, on July 19, 2022, the Office of Cannabis Policy (OCP) released a call for applications for interested parties to apply to the Metrc User Workgroup. The Office received a total of 19 applications, ultimately selecting a group of 14 qualified principals, plus five track-and-trace administrators who could accompany their principals and identify how the existing tracking system could be utilized or streamlined in a way that addresses the concerns of Maine's regular Metrc users. Three of Maine's four adult use license types were represented in the Workgroup, with the exception being cannabis testing facilities.

The members of the Metrc User Workgroup are as follows:

Cultivation Facility Representatives

Zach Allen, Nova Farms Maine, LLC
Zach's experience in the cannabis industry began with the Rhode Island Medical Marijuana Program where he cultivated, processed, and sold medicine to patients and dispensaries. During this time, he co-founded and served as Vice President for a patient advocacy group, RCRI LLC. Through this group, he testified at the House and Senate regarding the medical program. He worked closely with regulators during the inception of cultivator licenses that required licensees to integrate seed-to-sale software into their practices. Zach worked hand-in-hand with the software developers to assist in the operational functionality of their software. He later co-founded Nova Farms and was selected to be the track-and-trace administrator for Nova's Maine licenses.

When applying to the Workgroup, Zach shared, "I am interested in participating with the Workgroup because I feel in an ever changing and evolving regulatory landscape, adaptation is key to the growth of the industry as a whole…Being adaptable in this industry is key and having an open dialog about improvements, pain-points, and the program as a whole will streamline the success of the overall adult use program."

Mitchell (Ben) Samuelson, Seed and Soil
After getting an MSc in horticulture in 2019, Ben began working with a recreational cannabis seed farm, nursery, and cultivation license in California and later in Canada. After moving to Maine, Ben obtained an outdoor cultivation license and a nursery cultivation license. Ben's goal is to serve cultivators with cannabis genetics that perform well in Maine's outdoor environment. He learned all of the elements required to operate a seed business and has been the sole track-and-trace user for his licenses.

When applying to the Workgroup, Ben shared, "If the scope of the Workgroup touches on gray areas within the system, I have things to say about managing plant waste in outdoor farms, what is a 'strain' and how they should be tracked, and more detail on reporting salient production details without overburdening users."

Ryan Parker, Stoner & Co.
Ryan has worked in the cannabis industry since 2015 when he worked for a company to engineer and build large-scale agricultural facilities for cannabis and conventional farming. During that time, he was able to work on many large-scale projects all over the pacific northwest. After moving back to Maine, Ryan began consulting and worked for an indoor medical facility for three years. Later, he began working with Stoner & Co., initially in cultivation and then moving into a data driven role as a Cultivation Compliance team member.

When applying to the Workgroup, Ryan shared, "I would like to be part of a Workgroup to better understand the goals and reasoning for the State's ideals relating to track-and-trace systems, while also offering up my expertise and knowledge to the cultivation processes from seed/clone to harvest, as well as market dynamics I have seen and understood in my professional career in the cannabis industry."

Rebecca Matz, Stoner & Co.
Rebecca participated in the Metrc User Workgroup alongside Ryan Parker as Stoner & Co.'s track-and-trace administrator.

Manufacturing Facility Representatives

Elliot Lee, East Coast Cannabis
Elliot earned an undergraduate degree in economics, with a minor in mathematics. He also has a master's degree in public policy and management, where his studies focused on Maine's cannabis program. He began working in the cannabis industry in 2017, making edibles and working through packaging rules and regulations as well as food health and safety standards. In 2019, he began working with East Coast Cannabis. Elliot has worked with different software systems, including MJ Freeway, Viridian, Leaflogic, and Metrc. He interacts with Metrc daily for East Coast Cannabis and brings experience from the ground floor level to a managerial level.

When applying to the Workgroup, Elliot shared, "My interest in serving on this group is to both look at this through an operator lens, but also through a state lens, and through a Metrc lens, as to what is possible with the software. I believe track and trace is how we regulate and legitimize this industry in the eyes of not only legal operators, but also for all Mainers."

Steve Rusnack, Full Bloom
Steve has operated in the Maine Medical Use of Cannabis Program as a caregiver for over 10 years, engaging in manufacturing, extracting, and operating a caregiver retail store. Since December of 2020, he has operated an adult use manufacturing facility, producing edibles and concentrates. He also has adult use licenses for a cultivation facility and two retail stores.

When applying to the Workgroup, Steve shared, "I'd like to join this group to further the work done by the State in the industry, and to make sure that industry participants can smoothly operate within the guidelines and rules of the program."

Keri-Jon Wilson, Pot + Pan
Keri-Jon has been a registered caregiver engaged in edible manufacturing since 2015. In March of 2022, she obtained an adult use products manufacturing license, which she co-locates with her medical manufacturing company. Keri-Jon supports cannabis regulation in the State of Maine across both adult use and medical use industries and feels the growth of transparency into the industry benefits not only the consumers and patients, but also those employed in either industry along with residents of Maine.

When applying to the Workgroup, Keri-Jon shared, "Pot + Pan Manufacturing is strictly an edible manufacturer. In my training prior to going live in Metrc with licensing, I was discouraged at how Metrc catered mostly to the training of those with cultivation licenses."

Alison Miller, The Hashery
Alison began working in the cannabis industry in 2019 for a medical manufacturing company. In 2021, she joined The Hashery as the General Manager of Operations where she is responsible for writing all standard operating procedures as well as overseeing edible processing and solventless

hash rosin processing. Alison uses Metrc on a daily basis for batch creation, transfers from cultivation to manufacturing, and product creation to the lab. She also serves as the Metrc trainer for other staff to ensure practices are consistent and compliant with regulations.

When applying to the Workgroup, Alison shared, "I am interested in the Metrc User Workgroup because I have firsthand experience using the program...I believe Metrc needs to have a better training course given specifically to manufacturing facilities...I would love to see and be a part of Metrc becoming user friendly for manufacturing facilities and our practices."

Retail Store Representative

Peter Franklin, Maine Plant Based Therapy
Peter has worked in the cannabis industry for four years. His background with Metrc began in the Maryland industry, where he learned all retail functions of Metrc. He has hands-on experience with inventory audits, green wasting, sales adjustments, package adjustments, adding employees, API integrations, and more.

When applying to the Workgroup, Peter shared, "Metrc is a very useful tool for those who understand it. There are a few functions that could be improved such as the different options for adjustments, how receipts are recorded for future verification, and the finalizing of products and receipts. The use of non-standard weights by growers also creates difficulty in tracking product mistakes and issues with POS systems who utilize standard packaging weights such as gram, eighth, quarter, etc."

Vertically Integrated Operator Representatives

Jake Wisdom, Blue Sky & Kender Farms
Jake has worked with Blue Sky for two years, working with the technology, software, and compliance integration. Jake was responsible for selecting which integrated software programs to use with Metrc, as well as implementing, training, and creating standard operating procedures for Blue Sky employees. Jake has worked to optimize multiple cannabis software integrations, handling many scenarios from glitches to mistakes, and has worked directly with Metrc and integrated software programs such as Leaflogix, Dutchie, Weedmaps, Flowhub, and more.

When applying to the Workgroup, Jake shared, "I would love to help serve as a member of this Workgroup to help bridge some gaps we see as areas for improvement from an industry viewpoint...Working with operators is a great way to help bridge the gap with Metrc workflow and the way things work on a day-to-day basis. With the state of the industry, efficiency is the most important thing companies can do to make sure everything is going as it should."

Jake Daku, Blue Sky & Kender Farms
Jake participated in the Metrc User Workgroup alongside Jake Wisdom as Blue Sky's track-and-trace administrator.

Hilary Reeder, Highbrow
Hilary participated in the first Metrc User Workgroup meeting as Highbrow's track-and-trace administrator. She then became employed by OCP and thus stepped down from her role on the Workgroup to prevent a conflict of interest.

Rebecca O'Connor, Rugged Roots
Rebecca has used the Metrc system since its inception in Colorado. At the time, she was the

manager of one adult use and several medical stores, as well as a cultivation. She then began consulting, and during that time, she taught employees how to use Metrc. Her consulting career focused on inventory reconciliation. Now in Maine, Rebecca serves as the compliance and Metrc administrator for Rugged Roots.

When applying to the Workgroup, Rebecca shared, "My interest in serving in this Workgroup was inspired by our enforcement officer and for my desire to help cannabis companies stay in compliance. We have an amazing opportunity setting the stage for legalization in Maine and eventually all of the United States. I would be honored to serve in a panel that discusses how companies currently use Metrc and how to improve the system for ease of use."

Justice Rines, Sweet Dirt
Justice is a licensed attorney and was involved in founding Sweet Dirt. He has represented cannabis clients and has served Sweet Dirt as General Counsel, Chief Operating Officer, and Chief Compliance Officer. Justice is responsible for the creation and implementation of all internal policy and procedures to ensure compliance with State statute and rules. From conditional licensing and OCP review to operational reviews and refinements at the cultivation, manufacturing, and retail levels, Justice has intimate knowledge of the Maine cannabis industry, as well as an understanding of macro pressures that cannabis companies face.

When applying to the Workgroup, Justice shared, "We are a larger volume producer in Maine and, therefore, our challenges and concerns as it relates to Metrc, and seed-to-sale tracking are different. We would welcome the opportunity to provide our perspective, experience, and insight to help to make the system better for all stakeholders."

Lincoln Crutchfield, Sweet Dirt
Lincoln participated in the Metrc User Workgroup alongside Justice Rines as Sweet Dirt's track-and-trace administrator.

Eddie Benjamin, Theory Wellness
Eddie has been working within data, systems, operations, and information in the cannabis industry for close to 10 years, starting in Massachusetts and now with Theory Wellness in Maine. He worked in Metrc in various states including Colorado, Nevada, California, Massachusetts, and Maine. His focus has always been the seed-to-sale tracking technology and the underlying data that makes up the operations and systems.

When applying to the Workgroup, Eddie shared, "I hope to bring a sense of understanding to the data, the ability to extract meaningful data, and make sure that statistics, operations, and any way data is used in/across Maine from Metrc is able to be done so accurately and effectively."

James Matthew Judge, Ph.D., Theory Wellness
James Matthew participated in the Metrc User Workgroup alongside Eddie Benjamin as Theory Wellness' track-and-trace administrator.

Genevieve Bickford, Wellness Connection
Genevieve has worked for Wellness Connection of Maine (WCM) since 2015. She is well versed in the many facets of production and manufacturing of cannabis. She is proficient in OCP guidance and policy and was instrumental in compiling the necessary data for Wellness Connection's initial adult use license. She is responsible for any necessary policy and procedure updates for the team to ensure compliance.

When applying to the Workgroup, Genevieve shared, "I believe that serving as a member of the Workgroup can only benefit end users, third-party integrated APIs, and the state as a collective group to come together and determine effective solutions for the benefit of all. Working together to identify what challenges are involved and finding solutions to eliminate user error are skills I use daily within my position at WCM. I enjoy working with systems and finding concise, creative solutions to improve processes and ensure compliance."

Kristin McIntyre, Wellness Connection
Kristin participated in the Metrc User Workgroup alongside Genevieve Bickford as Wellness Connection's track-and-trace administrator.

IV. Workgroup Findings

Through the Metrc User Workgroup, the Office of Cannabis Policy (OCP) engaged directly with industry stakeholders on issues related to the State of Maine's cannabis inventory tracking system, Metrc. The first meeting held on August 23, 2022, began with an open forum for Workgroup members to express the problems they experienced with Metrc. OCP then reviewed those concerns and identified seven predominant issue areas to focus on in the remaining Workgroup meetings.

The seven issue areas are listed below for reference and are expanded upon in detail throughout this section.

1. Application Programming Interface (API)
2. Customer Service
3. Functionality
4. Reports
5. Testing
6. Training
7. User Experience

In the second meeting on September 13, 2022, OCP and the Workgroup members discussed the first half of the issues identified in more detail. Metrc then attended the third Workgroup meeting on October 11, 2022, to report on the topics discussed in the second meeting. After their presentation, OCP and the Workgroup discussed the second half of the issues identified in more detail. Metrc later attended the fourth Workgroup meeting on November 8, 2022, to give a presentation on the remaining issues not addressed during their initial presentation. Finally, the Workgroup did a deep dive into OCP's qualitative data analysis of all the challenges identified by the Workgroup members.

In addition to the open discussions held during the Workgroup meetings, OCP conducted a survey to gather additional substantive feedback from members on each of the seven issue areas. The survey consisted of 23 questions and aimed to help OCP solidify the Workgroup's proposed solutions and recommendations for Metrc by category. It also helped OCP determine the Workgroup's order of priority for those solutions.

Overall, OCP found that while the Workgroup's analysis was primarily centered around the seven issue areas, many of the problems and solutions identified were interrelated. The reinforcing nature of those discussions is evident throughout the remainder of this report. The seven sections that follow examine the substance of each issue identified above, the specific problems related to each issue, what OCP heard about those problems from both the Workgroup and from Metrc, and solutions and recommendations identified by the Workgroup for the challenges experienced by Maine Metrc users. For reference, the "proposed solutions" are ones that contain an immediate action item that may help alleviate the burden of the problem identified. The "ongoing solutions" are ones that are currently being discussed by Metrc and/or will exist as a continuous Metrc resource moving forward. The "recommendations for Metrc" are solutions identified by the Workgroup that will require further discussions and/or negotiations between OCP and Metrc before they can be implemented.

Application Programming Interface (API)

Metrc's primary function is to serve as a tool for regulators. It is not meant to be a business tool for industry members beyond that of regulatory compliance. To assist the industry, however, Metrc has an open application programming interface (API) that is designed to communicate with other cannabis inventory tracking and point of sale systems, helping businesses exchange data among their accounting, business, and inventory systems with the State's track-and-trace system.[1] It aims to minimize manual data inputting and task uploading as much as possible. All but one of the Metrc User Workgroup members indicated that they use an additional third-party software that connects to Metrc through an API, and OCP is confident that an overwhelming majority of industry members also use third-party tools that rely on API functionality.

OCP's qualitative data analysis concluded that Metrc's API integration may be lacking in its ability to seamlessly integrate with many other third-party vendors. As a result of this irregular integration, some users felt that manual data migration was a duplicative effort that was expending additional time and resources with limited value. Instead of focusing on business operations, licensees reported that they spend avoidable time in Metrc creating manifests, fixing common errors, and recording important details such as retail waste, returns, destruction, and new seedling batches through current clones and/or seeds.

Specifically, Metrc User Workgroup members reported having the following problems with Metrc's API:

- The lack of certain API integration points, including those for licensed transfers and manifests, necessitates manual data entry via the Metrc web interface. This limits opportunities for fully automated data transfers between third-party API vendors and Metrc and increases the chances of human data entry errors.
- There is no API for manifests.
- Common tasks are not automated, which results in users having to toggle between both Metrc and their third-party API software. These tasks include, but are not limited to recording retail waste, returns, and destruction, and recording the taking of clones and/or seeds from existing plants to create new seedling batches.

During the first Workgroup meeting, **Justice Rines of Sweet Dirt** expanded upon some of the concerns users have regarding API:

> *"API quality and development does not seem to be meeting the standard that Metrc is supposed to preserve. We are supposed to be preventing diversion; we are supposed to be tracking products so that we can recall them and minimize risk if there is a product recall event. Things like that. Those are pretty grave situations. We just don't feel that the API quality and development meets that criteria as evidenced by a litany of issues that we have had."*

During their presentation at the fourth Workgroup meeting, Metrc provided an update on API. They discussed improvements to come with the second version of API (API V2) and detailed how users can enter transfer information through the API. Workgroup members learned that some templates do exist for certain functions and that CSV uploads can be used for large

---

[1] Open API, Metrc, https://www.metrc.com/track-and-trace-technology/open-api/

transfers. Metrc also explained that some of the API functionality requested by Workgroup members, such as licensed transfers, is not provided for intentional reasons.

Upon evaluating and discussing the problems listed above, and after hearing directly from Metrc on the subject, OCP and the Metrc User Workgroup determined that the following solutions would be beneficial for Maine licensees.

Proposed solution/next steps: OCP will develop educational materials for Maine users around templating and CSV uploads for large data transfers. These templates are designed to reduce the amount of time and resources users expend reconciling data transferred from third-party vendors to Metrc, so it is important that users know how to use them efficiently. OCP will refer any training and materials it cannot develop in-house to Metrc and will recommend additional CSV uploads and templates to facilitate maximal integration as applicable.

Ongoing solution: Metrc has a dedicated support team specific for third-party vendors. Licensees should encourage their third-party vendors to contact Metrc's API support team to troubleshoot issues when they arise. While this support is only available to the third-party vendors themselves, licensees will be asked to ensure that their vendors are made aware of it.

<u>*Customer Service*</u>

As stated previously, Metrc's primary function is to serve as a tool for regulators. As such, licensees have reported challenges about the quality, accessibility, and responsiveness of Metrc's customer service team. They feel that Metrc's customer service team and its technical support goals have had to prioritize addressing system-wide technical issues and outages in addition to the concerns of individual licensees. Additionally, Maine licensees, especially new users learning to use the software, often have questions about certain functions and operations in Metrc. Workgroup members, along with other industry members, have expressed concerns about the quality of customer service they have received from Metrc when seeking answers to these routine questions.

OCP's qualitative data analysis concluded that the technical support and customer service licensees have received from Metrc has significant room for improvement. Licensees have reported that the extended customer service resolution times, hold times, and call back times have greatly impacted their day-to-day business operations and have contributed to some of the industry's dissatisfaction with the software.

Specifically, Metrc User Workgroup members reported having the following problems with Metrc's customer service:

- Users have no direct avenue to provide feedback to Metrc.
- When licensees speak with Metrc's customer support, there is often confusion about the roles and responsibilities divided between OCP as the client of Metrc, and the licensees as the software users.
- Users saw increased customer service wait times in early 2022, particularly when Metrc brought new states online and resources were limited. This led to increased wait times and long resolution times.
- Despite utilizing Metrc's "request a call back" feature, users report often not getting their customer service calls returned.

- At times, there has not been enough advance notice for when Metrc's services might be impacted. However, the Workgroup noted that this has improved recently.
- New users have limited means of accessing customer support specific to onboarding issues.
- Users, particularly new ones, often have the same reported pain points and questions, but lack a "go-to" resource for troubleshooting these common issues.

During the first Workgroup meeting, **Justice Rines of Sweet Dirt** expanded upon some of the concerns users have regarding customer service:

> *"One of the areas where we are seeing extended resolution times is if there is an issue with a test. If a test doesn't port correctly from a testing facility, it has taken five weeks for us to get a resolution before. In the meantime, we have already paid excise tax on that product, and it is just sitting there. We can't do anything with it. We have had issues recently of two plus hour hold times. I personally have been hung up on twice. Didn't even bother to say hello. Just connect and click."*

This was corroborated by **Elliot Lee of East Coast Cannabis**:

> *"If you get sent to the testing team,…that is where things go to die…A three hour hold time is very common. Them saying if you want to hold your place in line, we will hold your place in line. You can hang up. We will call you back. I have never been called back."*

During their presentation at the third Workgroup meeting, Metrc provided an update on their customer service response metrics and improvements. Metrc first acknowledged that they struggled with extended phone call wait time times and had other customer service delays earlier in 2022 as new states were being added to their system. They then shared with the Workgroup that their average customer service phone call wait time decreased from an average of two hours in June 2022 to under 10 minutes on average in October 2022. They also demonstrated that their support ticket turnaround times decreased significantly during the same period.

Upon evaluating and discussing the problems listed above, and after hearing directly from Metrc on the subject, OCP and the Metrc User Workgroup determined that the following solutions and recommendations would be beneficial for Maine licensees.

Proposed solution/next steps: To establish a way in which Maine users can provide continuous feedback to Metrc, OCP will be setting up quarterly meetings open to all Metrc users in Maine's Adult Use Cannabis Program. These virtual meetings will provide an open forum for users to share their feedback about Metrc's software with OCP. OCP will then deliver the industry's feedback to Metrc in writing after each quarterly meeting.

Ongoing solution: The Workgroup members would like Metrc to continue to provide advance notice for potential service interruptions and upcoming functionality changes. OCP will assist in this communication where applicable.

Recommendations for Metrc:

- Allow users to schedule a call back from customer service at a time that works with their schedule and allows them to be within ease of access to the software system.

- Utilize a dedicated resource (such as an Onboarding Specialist) within the customer service department to provide support specifically to new users.
- Revisit and expand Metrc's FAQs and make them accessible in the Metrc dashboard.

Functionality

The functionality challenges reported by the Workgroup members focused primarily on functions that users would like to see automated. Members believe that automation would streamline business processes, reduce the number of errors, and allow users to operate more effectively with the system. For example, selecting the required laboratory testing at each product stage is currently a manual function. If a solid/semi-solid edible is being sent for testing, users have to select the following tests: filth and foreign materials, homogeneity, metals-ingestion/suppository, microbials-e.coli, microbials-enterobacteriaceae, microbials-salmonella, microbials-total aerobic microbial count, microbials-total coliform, microbials-total yeast and mold count, potency (infused), and water activity. If a user forgets to click or miss-keys any of the required tests, or accidently includes any of the other tests that are not required for the product, the product will become locked in Metrc, meaning that the product is blocked from being transferred to a downstream licensee.

While a Metrc support ticket is required to correct this type of data entry mistake, most errors can be corrected, even if OCP needs to provide Metrc with the authorization to do so outside of the defined timeframes where licensees can self-serve. However, most errors are considered historic records in a closed loop tracking system and therefore cannot be deleted as that would break the audit chain.

OCP's qualitative data analysis concluded that Metrc functionality would benefit from improvement, particularly for preventing errors from onset that effect downstream functions or for providing avenues to correct errors throughout business operations without interrupting or delaying business. Users would also like to see increased automation.

Specifically, Metrc User Workgroup members reported having the following problems with Metrc's functionality:

- After a certain period of time, some operations cannot be undone and will become a permanent fixture within a user's Metrc account. Errors made when setting up inventory are particularly problematic.
- There is limited report functionality.
- There is no automation for test sample creation and transfers. No software can automate testing "checkboxes."[2]
- Errors in one row of a CSV file will cause an entire CSV upload to fail; any error in the file will create an upload error and will not allow a data transfer to be completed.
- There is a limitation on how much testing data is available for transferred packages to downstream licensees, especially if production batches were used in the workflow.
- There is no batch tracking functionality.

---

[2] At present, users cannot select the specific test batches and analytes to be tested via the API. This is a direct result of the testing batches, analytes, and test/retest requirements being different in every state, and frequently changing. Additionally, Maine's own testing/retesting workflows are far more complex than those used by some other Metrc states.

During the first Workgroup meeting, **Elliot Lee of East Coast Cannabis** expanded upon some of the concerns users have regarding functionality:

> *"One of the things that we noticed when we first got into Metrc...we made items wrong. We did not create, say wet/flower for instance was put as buds/flower, and now we are being taxed at a buds/flower rate instead of wet/flower. But I cannot go back in and fix that item because I assigned it inventory. It is a cancerous item that sits in my inventory waiting for someone to miss click it because we can't get rid of it. And we also can't change it. It is just sitting there as an incorrect item forever at this point.*

> *"Some way to try to help us navigate this with its repetitive, tedious clicking and adding and data entry that it knows. I don't know why I have to click every test for a flower test if you know I am testing flower. Why isn't there a pre-set flower? If you know I am making an edible – whether it's a tincture or a hard one – you know what should be on there. We all know. Should just have a button to click."*

During their presentations at the third and fourth Workgroup meetings, Metrc addressed challenges related to functionality in conjunction with other topic areas. For example, when discussing the user experience, Metrc shared that they had taken note of requests for fewer clicks and increased automation. When addressing reports, they discussed the upcoming integration of Tableau, a visual analytics platform to help improve reporting functionality. Metrc also highlighted dramatic improvements in customer service response times in recent months, new API software integration points, and a new training platform.

Upon evaluating and discussing the problems listed above, and after hearing directly from Metrc on the subject, OCP and the Metrc User Workgroup determined that the following solutions and recommendations would be beneficial for Maine licensees.

Ongoing solution: OCP continues to work with Metrc to implement a batch tracking solution. As required by PL 2021, ch. 628, this would allow for cannabis plants to be tracked by group at the stage of cultivation and upon transfer to another licensee. Based on conversations with the Workgroup members, OCP has determined that Metrc's proposed batch tracking functionality would be sufficient to meet the statutory expectations of PL 2021, ch. 628.

Notably, PL 2021, ch. 628 is a first-in-the-nation bill and batch tracking is currently not available in any other state or through any other inventory tracking system. This is largely because individual, plant-level tracking is the industry standard for seed-to-sale vendors like Metrc, from which batch tracking, or tracking by group, departs.

While Metrc has a proposed design for batch tracking, implementation ultimately depends on Metrc and the State coming to an agreement about the nature and structure of the functionality. Metrc has, however, demonstrated that it can continue to safeguard tracking for Maine's adult use cannabis industry while also providing batch tracking. As such, OCP is engaged in ongoing contract amendment negotiations with Metrc regarding the terms of implementation.

Recommendations for Metrc:
- Expand functionality for archiving locations, strains, and other items which are no longer in daily use and would not break the audit chain.
- Increase the visibility of non-proprietary information for unaffiliated transfers such as harvest date, test date, and pass/fail remediation data.

- Provide training and other resources to ensure users know how to properly batch track products when implemented.

Reports

Metrc provides a limited selection of canned reports in addition to the ability to extract select data to external CSV files. The listing of canned reports varies by license type, depending on the business functions applicable to a given cannabis establishment. This provides useful functionality for licensees. However, the list of currently available reports is not comprehensive, and some licensees have identified certain limitations with the existing reports and/or CSV file exports. For example, Workgroup members indicated that when pulling a stock report into an Excel spreadsheet, words such as "pounds" and miscellaneous characters are sometimes included. This requires users to have to manually modify the spreadsheets and remove the pre-populated, non-data fields, which takes time and is not sufficient for managing business operations. As such, the Workgroup members stated that they often prefer to use third-party reporting software over the Metrc stock reports.

OCP's qualitative data analysis concluded that the stock reports users have available to them in Metrc do not provide enough value in their current formats.

Specifically, Metrc User Workgroup members described having the following problems with Metrc's reports:

- Stock reports sometimes have column format issues. Excel files will report data in pounds rather than grams, for example.
- Users do not have the ability to view what their data looked like on a given date and time. In some cases, in order to reconcile active inventory at the end of each business day, users need to trace their way back to all parent packages to determine what the inventory state was at a given moment-in-time.
- Some licensees feel that the existing reports in Metrc are not sufficient for managing business operations, so they use a third-party software to remain efficient. While smaller operators could suffice with the limited stock reporting, many have reported also using third-party software to remain more productive.
- Metrc's canned reports cover a limited list of metrics and activities, leaving licensees without the ability to query their own reports with the metrics they may seek.

During the first Workgroup meeting, **Eddie Benjamin of Theory Wellness** expanded upon some of the concerns users have regarding reporting:

> *"Deficiencies in standard reporting that comes out of Metrc…if you download a current inventory report from Metrc from the stock reporting, it doesn't even have the quantities. There are some very basic things that are needed in the Metrc stock reporting. I don't know anyone that uses the Metrc stock reporting because it is so terrible."*

During their presentation at the third Workgroup meeting, Metrc shared that they were working to add Tableau, an industry tool for expanded data analysis and visualization, to its current reporting platform with a tentative date of availability in early 2023. With the integration of Tableau, reports will have the ability to provide data across multiple associated licenses and will offer Metrc users enhanced ability to sort, filter, and create visualizations. Metrc also told the

Workgroup that its Industry Reports Guide provides details on the existing canned reports and that columnar sorting and export functionality are available for all tables within Metrc.

Upon evaluating and discussing the problems listed above, and after hearing directly from Metrc on the subject, OCP and the Metrc User Workgroup determined that the following solutions and recommendations would be most beneficial for Maine licensees.

Ongoing solution: Metrc is migrating its report functionality to Tableau, a visual analytics platform. This will likely alleviate some of the problems users have related to canned reports, provided adequate training and support is made available to users.

Recommendations for Metrc:

- Retain selected units of measure and/or field formatting options.
- Create more reports specific to different license types and develop additional reports desired by the industry for production output, returns, grow time, waste, and yields.
- Provide users with training and other resources upon Metrc's roll out of Tableau, an upcoming functionality for reports.

Testing

Testing is a hallmark of a well-regulated cannabis program, and it is important for consumer health and safety that only tested adult use cannabis products make it to retail. As such, licensees are required to take and submit samples for testing across a variety of analyte categories such as molds and mildews, microbes, water activity, and residual solvents. The specific tests required vary depending on the stage that cannabis or cannabis products are in, and in Metrc, users are required to manually select the tests necessary for each sample at each stage. There are a number of selections available, however, which leaves room for human error during this part of the inventory tracking process. To reduce the need for duplicative data entry and opportunities for human error, Maine users would like the testing selection process to be automated through the API. Streamlining these components is difficult though due to the frequency of rule changes related to testing and complex remediation workflows.

OCP's qualitative data analysis concluded that problems related to testing stem from the testing data not being transparent nor automated in Metrc.

Specifically, Metrc User Workgroup members reported having the following problems related to Metrc's testing functions:

- Downstream licensees cannot always see the entire testing history for a given package if a production batch was involved.
- Metrc's testing functionality is too manual which creates more opportunities for human error.

During the first Workgroup meeting, **Elliot Lee of East Coast Cannabis** expanded upon some of the concerns users have regarding testing:

> *"When you are doing an unaffiliated wholesale transfer and you have items coming in, you do get test results. You get a lot of information. But one of the things the State wants to know is the harvest date, and you don't get that. You don't get certain information that you need. I have to make an assessment. I look at when it was tested*

and two weeks before that it was probably harvested and starting to cure, so it has to be in that ballpark. But you don't get a full history of that plant."

During their presentation at the fourth Workgroup meeting, Metrc explained how to create templates in the user interface for transfers to commonly used locations such as cannabis testing facilities. Metrc also shared that they are engaged in ongoing conversations with OCP about how to best streamline the selection of mandatory tests in Metrc adding that there are considerations to be made with the State's testing rules and regulations.

Upon evaluating and discussing the problems listed above, and after hearing directly from Metrc on the subject, OCP and the Metrc User Workgroup determined that the following solutions and recommendations would be beneficial for Maine licensees.

Ongoing solution: The Workgroup proposed streamlining the testing selection process in Metrc. As a result, OCP and Metrc are currently collaborating on avenues to accomplish this. However, no systematic changes will officially be made until after the legislative session in case additional testing changes are adopted.

Recommendations for Metrc:

- Clearly state the mandatory testing required for each item at each stage, including how much of a sample needs to be sent for testing.
- Allow users to save testing templates, which would allow licensees to save certain field default values for common transfers, workflows, or test submissions. This could result in downstream time savings when it comes to common data entry tasks.

Training

Training is listed as a key component of Metrc's support program and is designed to help industry members learn how to successfully engage with Metrc. In Maine, each track-and-trace administrator, as identified via the licensing process, is required to take the New Business Training and pass the related comprehension exam prior to receiving Metrc credentials. At this point, Metrc training is optional for all other licensees, but it is the responsibility of the official track-and-trace administrator to ensure that the proper level of training is provided to all employees. The online Metrc training is available to every active Individual Identification Card (IIC) associated with any active adult use licensed establishment on the Metrc Learn website. However, Maine licensees have found that most of Metrc's training offerings are too generic to be of substantive value. Both new and advanced users alike found the trainings offered to be ineffective at engaging users and teaching the necessary skills required to be a proficient user.

OCP's qualitative data analysis concluded that since many of Metrc's training tools are not specific to Maine's system, users do not find them sufficient. Users believe that training can be enhanced with the creation of a Maine "sandbox" environment, a test environment in which a user can have hands-on learning through testing software features. Maine licensees suggest that this sandbox environment be tailored specifically to Maine's regulatory system with a focus on reporting and other functionalities via written guidance.

Specifically, Metrc User Workgroup members reported having the following problems related to Metrc's training offerings:

- Training for new businesses is perceived as too generic and does not sufficiently set users up for success, especially training regarding initial inventory set up.
- There is a lack of Maine-specific content in existing Metrc training materials, specifically the starting guidance.
- There is a lack of content and training for more advanced Metrc users.
- More diverse training materials are needed to accommodate the range of expertise in users.
- There is not enough training related to the existing canned reports.
- Maine users do not have a virtual "sandbox" environment.

During the first Workgroup meeting, **Peter Franklin of Maine Plant Based Therapy** expanded upon some of the concerns users have regarding training:

> *"Lack of training that is involved with Metrc – if you are coming into this system and have no real idea of what is going on with Metrc – you get access to it once you get your license, you get product and you have no idea what to do with it. What to do in Metrc. How to accept it. You have to learn from the people that are making the first delivery. Where do you sign? How do you accept it? What room do you put it in? What does that even mean? You don't get that with any of the training."*

During their presentation at the third Workgroup meeting, Metrc introduced its new interactive training system called Metrc Learn and provided an overview of how to register for the platform to access trainings. Metrc shared that in addition to regularly updated on-demand content, there are now training "journeys" which allow users to test their knowledge throughout each module and perform actions in an environment mimicking the Metrc platform. These interactive trainings are specific to different license types and were launched during the time period in which the Workgroup met.

Upon evaluating and discussing the problems listed above, and after hearing directly from Metrc, OCP and the Metrc User Workgroup determined that the following solutions and recommendations would be most beneficial for Maine licensees.

Ongoing solution: Workgroup members expressed that they would like training materials in formats other than videos, such as guides and step-by-step instructions with screenshots. Metrc has since added a new training module in which trainings are laid out as "journeys" that require users to take a test demonstrating their proficiency at the end. It is anticipated that these offerings will help users better absorb training content.

Recommendations for Metrc:

- Add and enhance current training offerings:
    - Add new user training by license type.
    - Expand training to include how to accept an incoming transfer and what room to put it into.
    - Make future training videos more engaging.
- Revise and expand the new business training and existing materials to be Maine specific, where possible.
- Develop training and support materials for users as new functionalities become available.

- Develop and expand training on existing report functionality, including how to use Tableau, an upcoming functionality for reports.
- Create a sandbox environment for Maine licensees which would serve as an online environment that mimics the functionality found in the actual Metrc production environment. (This is a customization that specifically requires additional conversations between OCP and Metrc as the development would require added expenses.)
- Include training materials in the Metrc dashboard, as to not be exclusive to the Metrc website.

User Experience

User experience encompasses any interaction between a user and a product or service. A good user experience occurs when a product or service is easy to navigate and enjoyable to use, while a bad user experience stems from the product or service being overly complicated or confusing. User experience is important because it incorporates all the ways in which a brand aims to fulfill the user's needs and provide positive experiences that keep users loyal to their product or service. The Metrc User Workgroup members, however, described poor user experience within each of the areas previously described, including API, customer service, functionality, reports, testing, and training.

OCP's qualitative data analysis concluded that there is room for improvement related to the Metrc user experience. Improvements to the user view, system performance, and other areas could remove barriers and streamline the experience for various licensees.

Specifically, Metrc User Workgroup members reported having the following problems with the Metrc user experience:

- The system allows users to input incorrect information, displaying limited logic within the system to recognize errors in real time.
- Some selection items do not make sense for Maine license types.
- There is no way to remove an unsuccessful pheno-hunt[3] and users cannot rename a seed once they have found a successful one, but strains must be numbered to tie them back to the seed.
- Workflows are not necessarily streamlined for repetitive business processes, leading to "tedious" clicking.
- Customizations are limited.
- Users feel that the extra steps required for them to manually "finish" an electronic package, even if the electronic package is currently empty, are unnecessary. Until a product is "finished" it will continue to show up in inventory reports even though there is no inventory.
- Users who set up automatic payments still see a yellow payment pop-up window until their payment clears the bank.

During the first Workgroup meeting, **Peter Franklin of Maine Plant Based Therapy** expanded upon some of the concerns users have regarding the user experience:

---

[3] Pheno-hunting is the process of searching through many plants of a particular variety to find a phenotype with dominant traits desired by the grower.

"For the retail side of things, it is very difficult to just understand the basics of how Metrc works in that first week of opening and getting a license. And then it's all the stress of 'Am I doing it right?' and there is nothing to fall back on. If Metrc had a platform before actually giving you full access that you could mess around with and make adjustments and do whatever and see how it affects your inventory, that would be phenomenal just so that you are not making this permanent record of something before you even understand how it works…training would be so much more helpful if there were more videos, more guides, anything more."

During their presentation at the fourth Workgroup meeting, Metrc provided information on discontinuing items, finishing packages, finalizing sales receipts, and saving column configurations as these are helpful tools for cleaning up the user view and improving system performance. Metrc also shared that while a refresh to the Metrc user interface is on the horizon to further improve the user experience, they have taken note of the industry's need for increased automation with API and CSV uploads.

Upon evaluating and discussing the problems listed above, and after hearing directly from Metrc on the subject, OCP and the Metrc User Workgroup determined that the following recommendations would be beneficial for Maine licensees.

Recommendations for Metrc:

- Develop pop-ups or a "wizard" to alert users when incorrect data is being entered. A wizard could also act as a guide when navigating the system.
- Create selection items more specific to Maine license types.
- Give users the ability to archive unused items.
- Offer customizable homepage settings to include commonly used inventory at the top of users' lists and include presets for the number of visible records per page.
- Explore opportunities for business defined workflow templates/streamlining.
- Remove or limit payment notifications for any user who has set up automatic payments.

V. Conclusion

Overall, the four Metrc User Workgroup meetings helped OCP develop a better understanding of the challenges faced by industry members during the inventory tracking process.

Some key areas of agreement included that:

- API integration is lacking in some regards, so licensees often have to spend time manually fixing errors and recording important details in Metrc;
- The customer service that licensees have received from Metrc does not live up to their expectations and extended resolution times, hold times, and call back times have significantly impacted day-to-day business operations;
- Metrc functionality needs improvement, particularly for preventing errors from onset or providing avenues to correct errors throughout the system;
- The stock reports users have available to them in Metrc do not provide enough value in their current formats;
- Testing data is not transparent nor automated in Metrc, which creates opportunities for human error;
- Many of Metrc's training tools are not specific to Maine's inventory tracking system, therefore users do not find them sufficient; and
- There is room for improvement related to the Metrc user experience, particularly to the user view and system performance.

The recommendations made throughout this report are ones that would address the feedback OCP has received from the Workgroup members and others, including the areas of agreement listed above. OCP will have continued discussions with Metrc about these recommendations and takeaways, which aim to streamline the track-and-trace system for Maine licensees. This is fundamental to increasing the efficiency of licensees' day-to-day business operations and to OCP's ability to ensure adult use cannabis establishments remain in compliance.

In the short term, OCP will also:

- Continue to work with Metrc to implement a batch tracking solution pursuant to PL 2021, ch. 628;
- Develop educational material for Maine users around templating and CSV uploads for large transfers;
- Closely monitor the API V2 implementation, the Tableau reporting integration, and the customer service turnaround times;
- Explore the option of a sandbox training environment; and
- Set up quarterly meetings for Maine licensees to log on and share feedback with OCP about the inventory tracking system, which OCP will then relay to Metrc as applicable.

OCP thanks the Metrc User Workgroup members for volunteering their valuable time to participate in this process. Their willingness to engage in productive conversations about Maine's cannabis inventory tracking system was critical to the successful identification of recommendations for Metrc.

Appendix A – First Workgroup Meeting Materials

Meeting Date: August 23, 2022
Video Location: https://www.youtube.com/watch?v=lR6H_j2C_tc

STATE OF MAINE
OFFICE OF CANNABIS POLICY
162 STATE HOUSE STATION
19 UNION STREET
FIRST FLOOR
AUGUSTA, MAINE 04333-0162

JANET T. MILLS
GOVERNOR

ADMINISTRATIVE & FINANCIAL SERVICES

KIRSTEN LC FIGUEROA
COMMISSIONER

OFFICE OF CANNABIS POLICY

ERIK GUNDERSEN
DIRECTOR

AGENDA

Tuesday, August 23

2:00 p.m. - 4:00 p.m.

Metrc User Workgroup Meeting #1

Office of Cannabis Policy Mission Statement: to ensure the health and safety of all Mainers by effectively and responsibly licensing and regulating cannabis establishments.

Metrc User Workgroup Purpose: to identify how the current tracking system can be utilized or streamlined in a way that addresses the concerns from Maine's regular Metrc users.

Topic	Time	Participant(s)
Welcome, Introductions, & Expectations	2:00 – 2:20 p.m.	OCP Director Erik Gundersen
Existing Challenges & Customer Service	2:20 – 3:05 p.m.	All
Batch Tracking	3:05 – 3:45 p.m.	All
Future Agenda Items	3:45 – 3:55 p.m.	All
Conclusion & Next Steps	3:55 – 4:00 p.m.	OCP Director Erik Gundersen

Appendix B – Second Workgroup Meeting Materials

Meeting Date: September 13, 2022
Video Location: https://www.youtube.com/watch?v=wES84gFkl3M

AGENDA

Tuesday, September 13

2:00 p.m. - 4:00 p.m.

Metrc User Workgroup Meeting #2

Office of Cannabis Policy Mission Statement: to ensure the health and safety of all Mainers by effectively and responsibly licensing and regulating cannabis establishments.

Metrc User Workgroup Purpose: to identify how the current tracking system can be utilized or streamlined in a way that addresses the concerns from Maine's regular Metrc users.

Topic	Time	Participant(s)
Welcome & Recap from Meeting #1	2:00 – 2:20 p.m.	OCP Director Erik Gundersen
Training	2:20 – 2:45 p.m.	All
Customer Service	2:45 – 3:15 p.m.	All
Reports	3:15 – 3:35 p.m.	All
Testing	3:35 – 3:55 p.m.	All
Conclusion & Next Steps	3:55 – 4:00 p.m.	OCP Director Erik Gundersen

Appendix C – Third Workgroup Meeting Materials

Meeting Date: October 11, 2022
Video Location: https://www.youtube.com/watch?v=89VlC-AVOQ0
Metrc Presentation:
https://www.maine.gov/dafs/ocp/sites/maine.gov.dafs.ocp/files/inline-files/ME%20Workgroup%20Metrc%20Presentation_Final.pdf

STATE OF MAINE
OFFICE OF CANNABIS POLICY
162 STATE HOUSE STATION
19 UNION STREET
FIRST FLOOR
AUGUSTA, MAINE 04333-0162

ADMINISTRATIVE & FINANCIAL SERVICES

KIRSTEN LC FIGUEROA
COMMISSIONER

OFFICE OF CANNABIS POLICY

ERIK GUNDERSEN
DIRECTOR

JANET T. MILLS
GOVERNOR

AGENDA

Tuesday, October 11

2:00 p.m. - 4:00 p.m.

Metrc User Workgroup Meeting #3

Office of Cannabis Policy Mission Statement: *to ensure the health and safety of all Mainers by effectively and responsibly licensing and regulating cannabis establishments.*

Metrc User Workgroup Purpose: *to identify how the current tracking system can be utilized or streamlined in a way that addresses the concerns from Maine's regular Metrc users.*

Topic	Time	Participant(s)
Welcome, Introductions, & Expectations	2:00 – 2:05 p.m.	OCP Interim Director Vern Malloch
METRC	2:05 – 2:20 p.m.	All
Testing Continued	2:20 – 2:40 p.m.	All
API	2:40 – 3:00 p.m.	All
Automation	3:15 – 3:30 p.m.	All
User Experience Gaps	3:30 – 3:55 p.m.	All
Conclusion & Next Steps	3:55 – 4:00 p.m.	OCP Interim Director Vern Malloch
Welcome, Introductions, & Expectations	2:00 – 2:05 p.m.	OCP Interim Director Vern Malloch

metrc

Maine Industry Workgroup
10/11/22

www.metrc.com

◎ Agenda

✓ **Introductions**
  • Brent Doherty, *Key Program Manager*
  • Myra Chinn, *Lab Testing and Training Lead*
  • Tricia Mills, *Director of Support*

✓ **Support**
  • Response metrics update
  • Support improvements

✓ **Training**
  • Register for Metrc Learn
  • Training Journeys
  • Learning Library

✓ **Reports**
  • Tableau overview
  • Metrc Data Platform

Training

Metrc Learn: How to register

Multiple options to access registration

Option 1:

- Navigate to the Metrc homepage

- Select "Sign up for Training"

- Complete registration information

Option 2:

- Log in to Metrc with your credentials

- Click the Support tab and select "Sign up for Training" in the dropdown box

- Complete registration information

Option 3:

- Visit Metrc.com and select the dropdown box in upper right

- Click "Partners" > "Maine" > "Training and Info" > "Metrc Learn" button

- Complete registration information
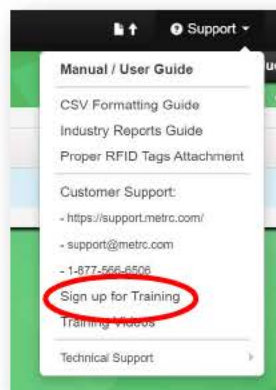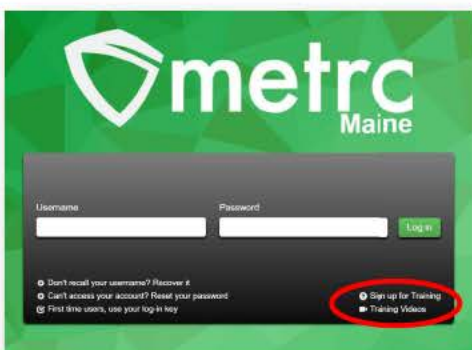
◎ Metrc Learn registration

Submit your information to kickstart registration approvals

Registration steps:

- Populate all form fields with your information

- Metrc will receive your registration request

- Please allow 24 hours for registration approval

- Once approved, you will receive an automated Welcome email to sign in and set your password:

https://metrclearn.bridgeapp.com//login
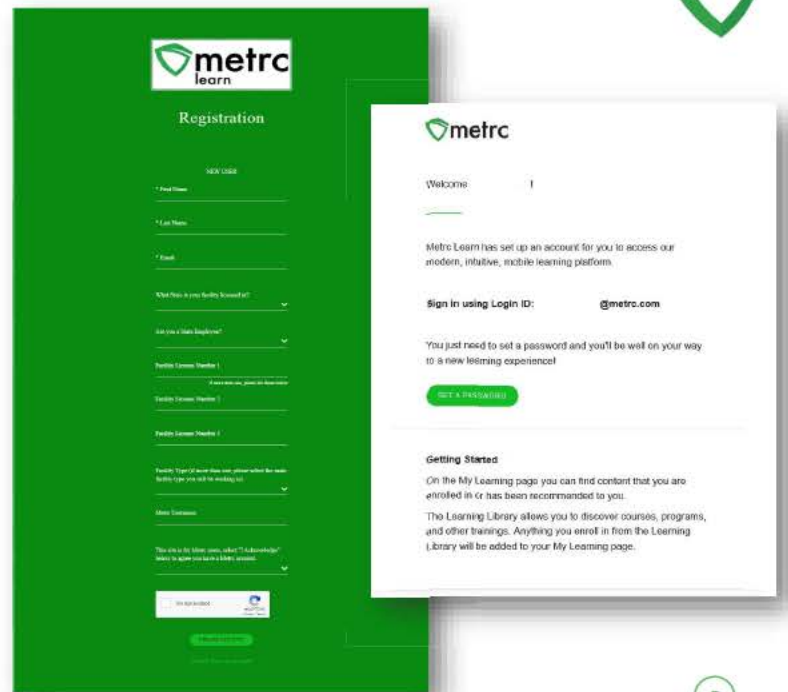
◎ Accessing Metrc Learn

Login to gain access to training

Login steps:

- Enter your username – the email you entered during the registration process

- Enter your password – this was set upon receiving your Welcome email

- View your assigned "Training Journey" – based on the facility license type selected during the registration process

- View on-demand webinar trainings for education that works on your schedule!

https://metrclearn.bridgeapp.com//login
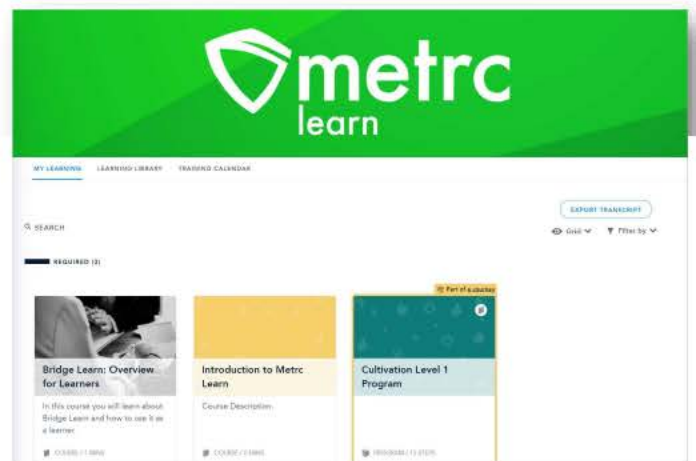
Metrc Learn: Training Journey

A new interactive learning tool specific to different license types

- Once logged in, navigate to "My Learning" to view training modules developed for your facility license type

- Training journeys allow learners to walk through modular-based training that includes the ability to test knowledge through performing the actions in an environment mimicking the Metrc platform

  https://metrclearn.bridgeapp.com//login
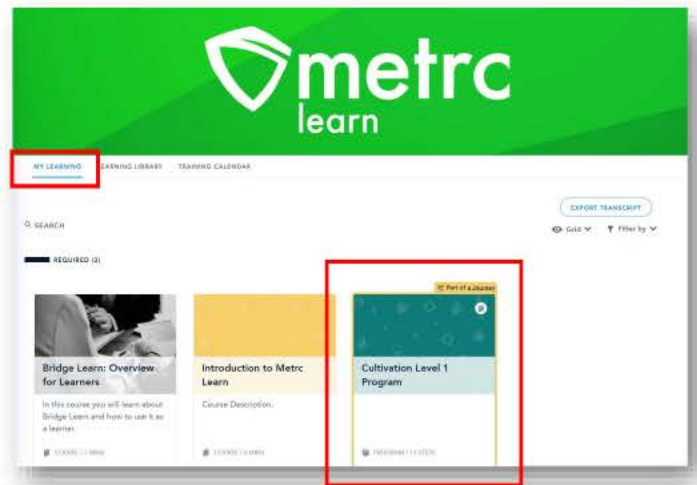
Metrc Learn: Webinars

On-demand training available through the Learning Management System (LMS)

- Navigate to "Learning Library" to view on-demand training content

- Metrc continuously updates content, including short educational videos on specific functionality

  https://metrclearn.bridgeapp.com//login
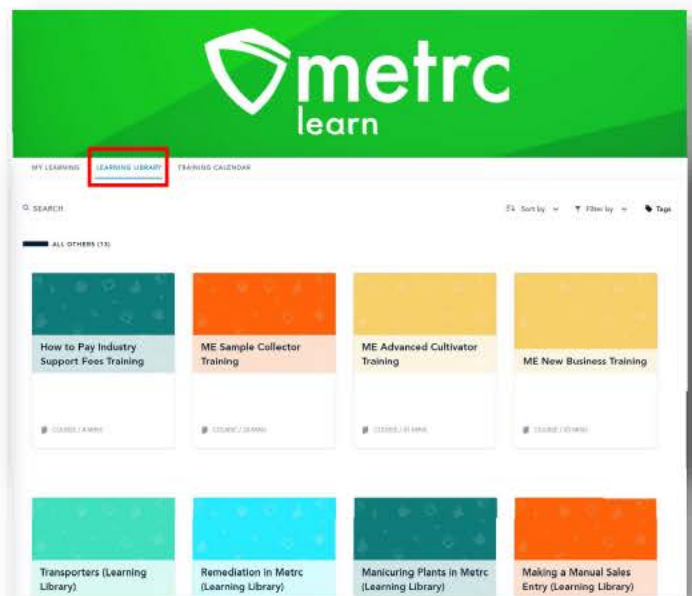
Support

◎ **Metrc Support updates**
Response metrics and improvements

June
2022

- 18.17 hours – Regular tickets
- 85.92 hours – Testing tickets
- Avg. 2+ hours phone calls

July
2022

- 12.09 hours – Regular tickets
- 59.23 hours – Testing tickets
- Avg. 30-minute phone calls

August
2022

- 16.80 hours – Regular tickets
- 11.26 hours – Testing tickets
- Avg. 6.43-minute phone calls

September
2022

- 13.77 hours – Regular tickets
- 9.74 hours – Testing tickets
- Avg. 5.45-minute phone calls

October
2022

- 6 36 hours – Regular tickets
- 9.7 hours – Testing tickets
- Avg. 6.5-minute phone calls

Please note the Metrc SLA is 72 hours to allow for additional research
and process intake for testing in every state.

Support Ticket Turnaround Times (Hours)

Regular Support Tickets   Testing Support Tickets

Phone Call Wait Time (Minutes)

Please note the Metrc SLA is 72 hours to allow for additional research and process intake for testing in every state.

Reports
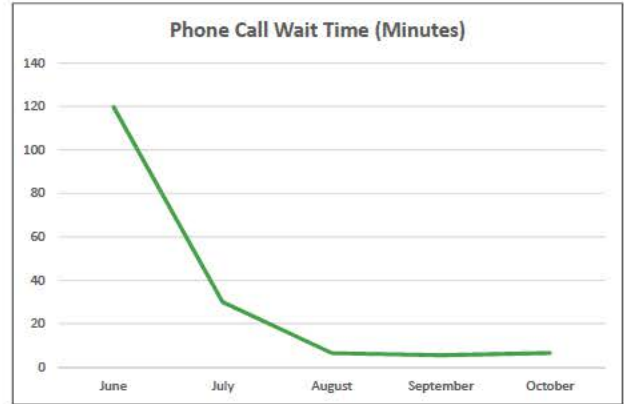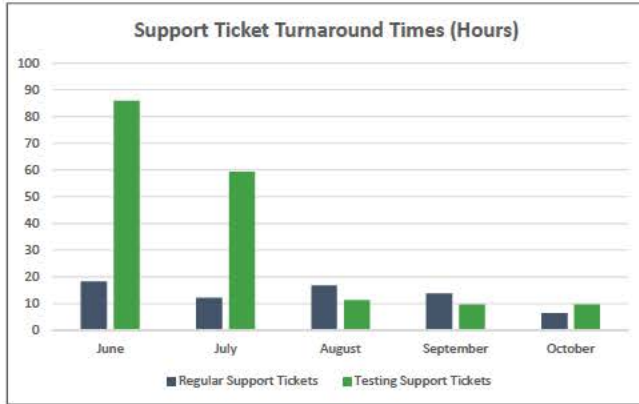
Tableau overview

An industry leading tool that allows for expanded data analysis and visualization

- Metrc is working diligently to provide this data analysis as an added feature to the current platform

- OCP already leverages similar tools in their open-data platform
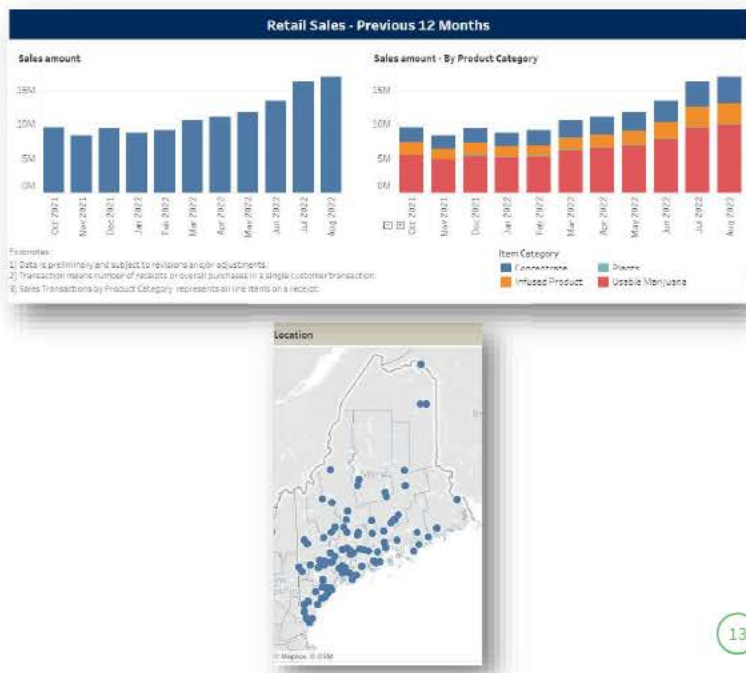
Tableau: Improved reporting functionality

Current reports
- Depending on license functionality, canned reports are already available
- The Industry Reports Guide provides details on available reports
- Columnar Sorting & Export functionality is available for all tables within Metrc

Tableau Reports
- Ability to provide data across multiple associated licenses
- Enhanced ability to sort, filter, and create visualizations
- Available in 2023!
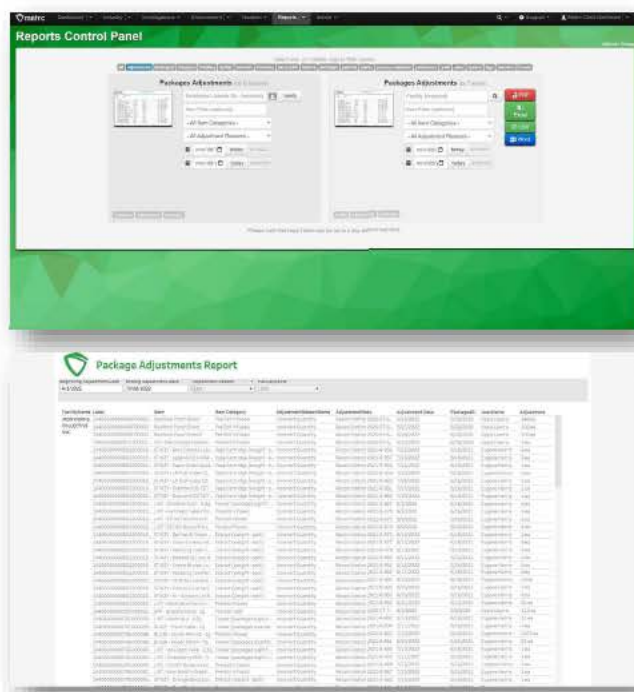
Q&A

Dedicated to supporting licensed businesses in Maine

For Metrc-related questions:

www.metrc.com

support@metrc.com

1-877-566-6506

15

Thank you

Appendix D – Fourth Workgroup Meeting Materials

Meeting Date: November 8, 2022
Video Location: https://www.youtube.com/watch?v=BY2FaLHL1PI
Metrc Presentation:
https://www.maine.gov/dafs/ocp/sites/maine.gov.dafs.ocp/files/inline-files/ME%20Workgroup%20Metrc%20Presentation%2011.8.22_0.pdf
Workgroup Problems and Solutions:
https://www.maine.gov/dafs/ocp/sites/maine.gov.dafs.ocp/files/inline-files/Metrc%20Workgroup%20Problems%20%26%20Solutions.pdf
Survey Results:
https://www.maine.gov/dafs/ocp/sites/maine.gov.dafs.ocp/files/inline-files/Metrc%20Workgroup%20%234%20OCP%20Slide.pdf

JANET T. MILLS
GOVERNOR

STATE OF MAINE
OFFICE OF CANNABIS POLICY
162 STATE HOUSE STATION
19 UNION STREET
FIRST FLOOR
AUGUSTA, MAINE 04333-0162

ADMINISTRATIVE & FINANCIAL SERVICES

KIRSTEN LC FIGUEROA
COMMISSIONER

OFFICE OF CANNABIS POLICY

VERNON W. MALLOCH
INTERIM DIRECTOR

AGENDA

Tuesday, November 8
2:00 p.m. - 4:00 p.m.
Metrc User Workgroup Meeting #4

Zoom Link:
https://us06web.zoom.us/j/83559349935?pwd=WFdEcmczOVhyMFZLWVFOSDNIUnRpQT09

Office of Cannabis Policy Mission Statement: *to ensure the health and safety of all Mainers by effectively and responsibly licensing and regulating cannabis establishments.*

Metrc User Workgroup Purpose: *to identify how the current tracking system can be utilized or streamlined in a way that addresses the concerns from Maine's regular Metrc users.*

Topic	Time	Participant(s)
Welcome, Introductions, & Expectations	2:00 – 2:05 p.m.	OCP Interim Director Vern Malloch
Metrc	2:05 – 2:25 p.m.	All
Workgroup Survey	2:25 – 3:25 p.m.	All
Discussion & Priorities	3:25 – 3:55 p.m.	All
Conclusion & Next Steps	3:55 – 4:00 p.m.	OCP Interim Director Vern Malloch

Maine Industry Workgroup
11/7/22

API Updates

Metrc Application Programming Interface (API) Updates

Continued innovation drives upcoming API improvements

API v2

- \>160 current endpoints will increase by 26 new endpoints for third-party Metrc integrators

- Current API access will remain alongside v2 for ease of transition

- No additional Metrc charges to licensees for the use of the new API

- New API v2 endpoints are part of Metrc's commitment to improving the experience for end users and integrators

Transfer Template API Endpoints

Creating Staging Manifests through the API

- End-to-end transfers will not be available in API v2

Ability to enter transfer information through the API:

- Create transfer templates for repeat transfers

- Save Driver and Vehicle information

- Setup the entire transfer through the API, log in to Metrc to create the transfer from the template created

- Use the CSV upload functionality for transfers with a large number of packages

Automation
&
User Experience

◎ User Experience
Improvements to the Metrc User Interface and requested feedback from the industry

- **Metrc would like your feedback on how your experience has been working with the system**
  - Emails to support are all recorded, and we do capture these requests across all jurisdictions

- **Cleaning up views in Metrc**
  - Discontinuing items, finishing packages, and finalizing sales receipts are helpful tools to clean up the user view and help system performance
  - Saving configuration under user preferences will save the configuration of the columns for tables

- **A UI refresh is on the Metrc roadmap to improve the user experience**

- **Noted requests for less clicks and increased automation**
  - Integration and improvements to the API
  - CSV uploads

For Metrc-related questions:

www.metrc.com

support@metrc.com

1-877-566-6506

Thank you

Category	Bucket	Problem	Essence of Issue	Potential Solutions Identified by Workgroup
1	API	Frequency of API errors (regardless of API vendor)	API integration is lacking in some regards which wastes resources and time in business operations. This time includes: creating manifests, fixing common and frequent errors, and recording important details such as retail waste, returns, desctruction, and creating new seedling batches through current clones/seeds.	Third party vendors can contact Metrc's API support team to troubleshoot particular issues
	API	No API for manifests		
	API	No automation for common tasks causing users to have to toggle between both Metrc and their third party software. These include, but are not limited to recording retail waste/returns/destruction and recording the taking of clones and/or seeds from existing plants in order to create new batches of seedlings		
2	Customer Service	Users have no direct way to provide feedback to Metrc. When they speak to customer support, they are told OCP is Metrc's customer, not them	There is conflicting information regarding ownership and responsibilities between Metrc and OCP. As a result, customer service within Metrc has been limited and significantly impacted day-to-day business operations.	OCP/Metrc to establish some mechanism by which Maine users can provide continual feedback to Metrc
	Customer Service	Increased customer service wait times in early 2022, especially after new states were brought online, leading to extremely long wait times and even longer resolution times		
	Customer Service	Users report not getting called back despite utilizing Metrc's "request a call back" functionality		Allow users to schedule a call back time, one that works with their schedule and allows them to be near a computer
	Customer Service	Not enough advance notice when services might be impacted, although this has gotten better recently		Continue to provide advance notice for potential service interruptions and advance notice of upcoming functionality changes
	Customer Service	New users have limited means of accessing customer support specific to onboarding issues		Create a dedicated team (including an Onboarding Specialist) within the customer service department to provide support specifically to new users
	Customer Service	Users, new ones in particular, often have the same pain points and ask the same questions, but no "go-to" resource exists to troubleshoot those common issues		Revisit and expand FAQs, then make them accessible in the Metrc dashboard
3	Functionality	Some operations are unable to be undone after a certain period of time and will become a permanent fixture within a user's Metrc account; errors made when setting up inventory are particularly problematic	Metrc functionality needs improvement, particularly for preventing errors from onset or providing avenues to correct errors throughout business operations.	Discontinue or archive functionality to retroactively remove errors
	Functionality	Reporting functionality		When Metrc rolls out Tableau, users will need training and other resources
	Functionality	No automation for test sample creation and transfers; no software can automate testing "check boxes"		
	Functionality	CSV uploads are "all or nothing" not "row by row," so any error in the file will create an upload error/does not allow for complete data transfer; errors in one row of a CSV file will cause the whole CSV upload to fail		
	Functionality	Insufficient upfront information for unaffiliated transfers		Increase visibility of non-proprietary information for unaffiliated transfers: harvest date, test date, pass/fail remediation data
	Functionality	Batch tracking functionality		Training and other resources will be needed to ensure users know how to properly batch track products when implemented
4	Reports	Canned reports sometimes have column format issues (Ex: XLS will report in LBs rather than grams)	Canned reports are not providing value in current formats.	Retain selected units of measure and/or field formatting options
	Reports	Users need to know the oldest product date in order to reconcile active inventory at the end of each business day		Allow for active inventory to be reconciled at the end of each business day without having to know the oldest product date
	Reports	Existing reports in Metrc are not sufficient to manage business operations so third party software is sometimes needed		Future integration with Tableau being discussed by Metrc
	Reports	Inability to view what the data looked like on a given date and time		
	Reports	Gaps in the reports provided versus reports desired		Additional reports desired: production output, returns, grow time, waste, yields; create more reports specific to license type

Category	Bucket	Problem	Essence of Issue	Potential Solutions Identified by Workgroup
	Reports	Unneccesary steps required to manually "finish" a product even if inventory is "empty." Until a product is "finished" it will continue to show up in inventory reports even though there is <u>no</u> inventory		
5	Testing	Downstream licensees cannot always see the entire testing history for a given package if a production batch was involved	Testing data is not transparent nor automated.	
	Testing	Testing functionality is too manual creating opportunities for human error		Streamline testing selection process
6	Training	New business training is too generic; not sufficient to set up new users for success		New user training by license type; future video trainings not recorded in monotone (i e., more engaging); expand training to include how to accept an incoming transfer and what room to put it into
	Training	Lack of Maine specific content in existing training materials, specifically the starting guidance		Revise and/or expand the new business training and existing materials to be Maine specific, where possible
	Training	Lack of content and training for more advanced users	Training is not specific to Maine's system, and therefore too generic to be applicable. Trainings can be enhanced by creating a "Maine Sandbox" environment and/or with more tailoring to Maine's regualtory system in written guidance focused on reporting and other functionalities.	
	Training	More diverse training materials are needed		Create/expand training materials; not just videos, but also guides and step-by-step instructions with screenshots. Also include materials in Metrc dashboard, not just on Metrc website
	Training	Any new functionality - sandbox, discontinue, customizations, batch tracking - should be accompanied by training and support materials for users		Develop training and support materials for users as new functionalities become available
	Training	There are not enough trainings on existing report functionality		Develop/expand training on existing report functionality, including how to use the reporting tool
	Training	No Metrc virtual sandbox - New business training is too generic; not sufficient to set up new users for success, especially re: initial inventory set up		Create a sandbox based on the Oregon model OR develop a test environment sandbox
7	UX	System allows for users to input incorrect information (even when it is clearly wrong)		Develop pop-ups or a "wizard" to alert users when incorrect data is being entered; a wizard can act as a guide when navigating the system
	UX	Some selection items do not make sense for Maine license types		Create selection items more specific to Maine license types
	UX	No way to remove unsuccessful phenohunt; can't rename a seed once they've found a successful one (strains have to be numbered to tie them back to the seed)	The Metrc interface is not user friendly for licensee types in Maine specifically and therefore is a barrier to success instead of a tool for successful regulatory compliance.	Ability to archive unused items
	UX	Limited customizations and "tedious" clicking		Customizable homepage settings to include commonly used inventory at top of lists; presets for the number of visible records per page
	UX	Workflows aren't streamlined for repetitive business processes, leading to "tedious" clicking		Explore opportunities for business defined workflow templates/streamlining
	UX	Yellow payment pop-ups: users who set up automatic payments are still hounded by these pop-ups until the payment clears the bank		Remove or limit payment notifications for any user who has set up automatic payments

21. Please rank these essences in order of importance to delivering positive benefits to your business.

Rank	Options
1	Functionality
2	API
3	Customer Service
4	Testing
5	User Experience
6	Training
7	Reports

First choice ■ ■ ■ ■ ■ ■ ■ Last choice