

Bulletin Number: CO_IB_6.26.2024	Distribution Date: 06/26/2024	Effective Date: 06/01/2024
Contact Point: Metrc Support	Subject: Billing and Support fee functionality enhancements in Metrc	
Reason: Provide an update on new billing and Support fee functionality in the Metrc system that will offer Administrators more visibility into account financial status related to Metrc fees.		

Greetings,

Metrc values our relationship, takes pride in supporting the success of licensed business operations, and recognizes that to remain compliant with all license requirements, it is important that access to financial documentation, account status information, and easier payment options be more readily available.

Based on valuable feedback from licensees across the markets we serve, Metrc is excited to announce the launch of new system enhancements related to account financials and billing functionality.

The following Metrc system functionality is available to licensees in the state of Colorado as of 5/13/2024:

- Financial permissions
- Real-time account status
- Invoice availability in the Invoice grid

The first billing cycle reflecting changes was scheduled for June 1st, 2024.

Additionally, Metrc is providing clarification around existing functionality that improves the payment experience of monthly fees, ensures all licensed businesses remain current on payments due, and additionally, remains compliant with license requirements.

Please read on for more information regarding this new functionality.

Financial permissions

Historically, upon credentialing a new license in the Metrc system, the first Admin added to the account defaults as the financial point of contact. While this default setting will not change, the Admin will now have the ability to designate additional financial points of contact, or backup administrators with financial permissions, for payment purposes.

To designate one or more additional financial points of contact, navigate to the Admin area drop-down on the navigational toolbar and select the Employees option to access the Employees Grid – see Figure 1.

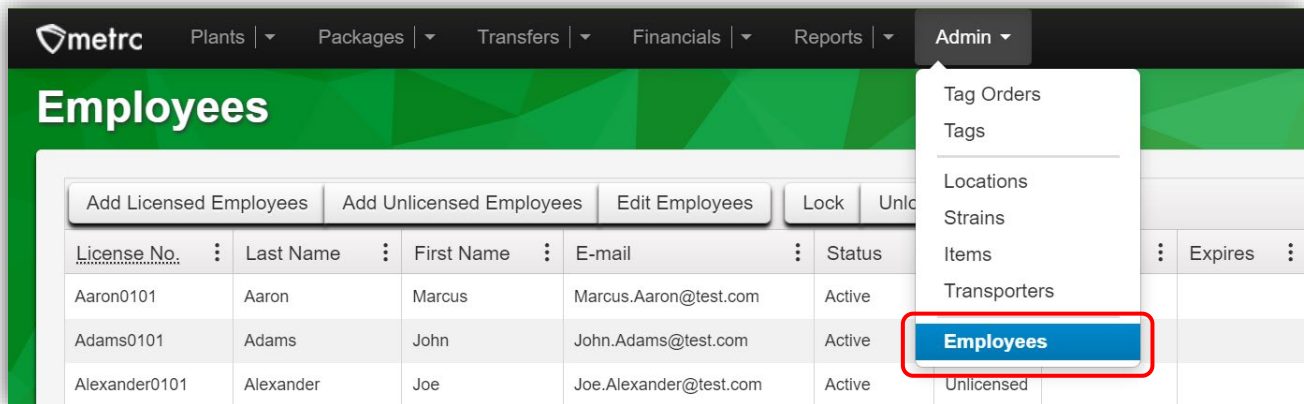


Figure 1: Employees Grid

Once on the Employees grid, highlight the employee to be edited, then select the Edit Employees button – see Figure 2.

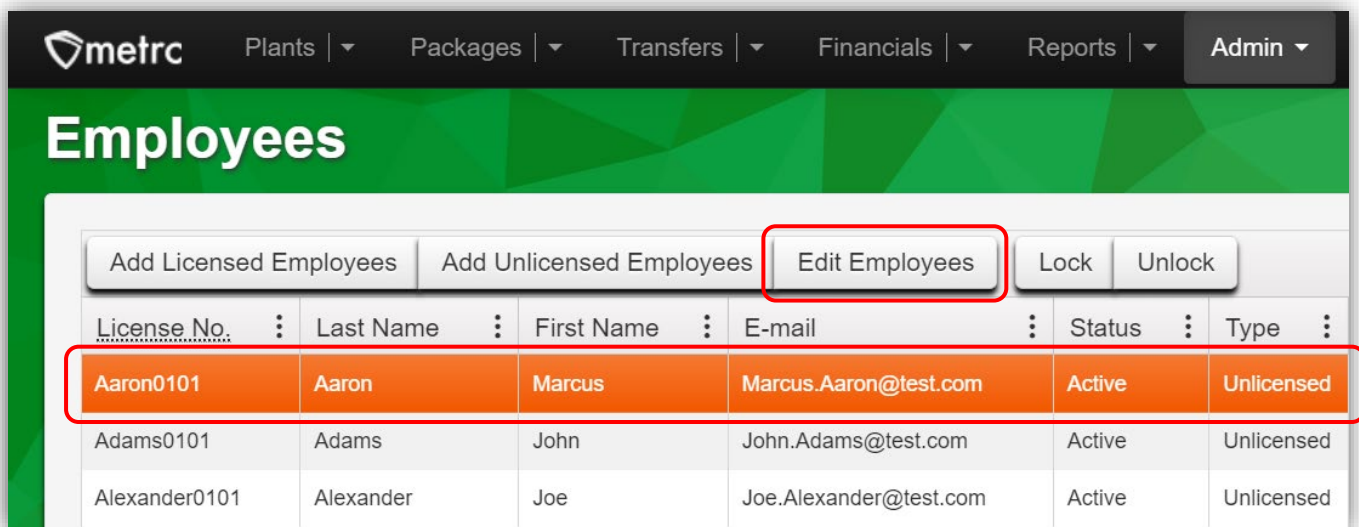


Figure 2: Edit Employees button

In the Edit Employees action window, there are three areas that determine the level of access an employee can have to financial information – see **Figure 3**.

Financial contact at this facility: Selecting this checkbox designates the employee as a financial point of contact at the licensee’s facility.

Financials Menu > All – Manage: Selecting this checkbox allows the employee to access all three areas of Financials: Credit Cards, Financial Summary, and Invoices.

Financials Menu > Invoices – View: Selecting this checkbox allows the employee to view the Invoices grid only.

Follow the same steps above to designate permissions for each individual employee.

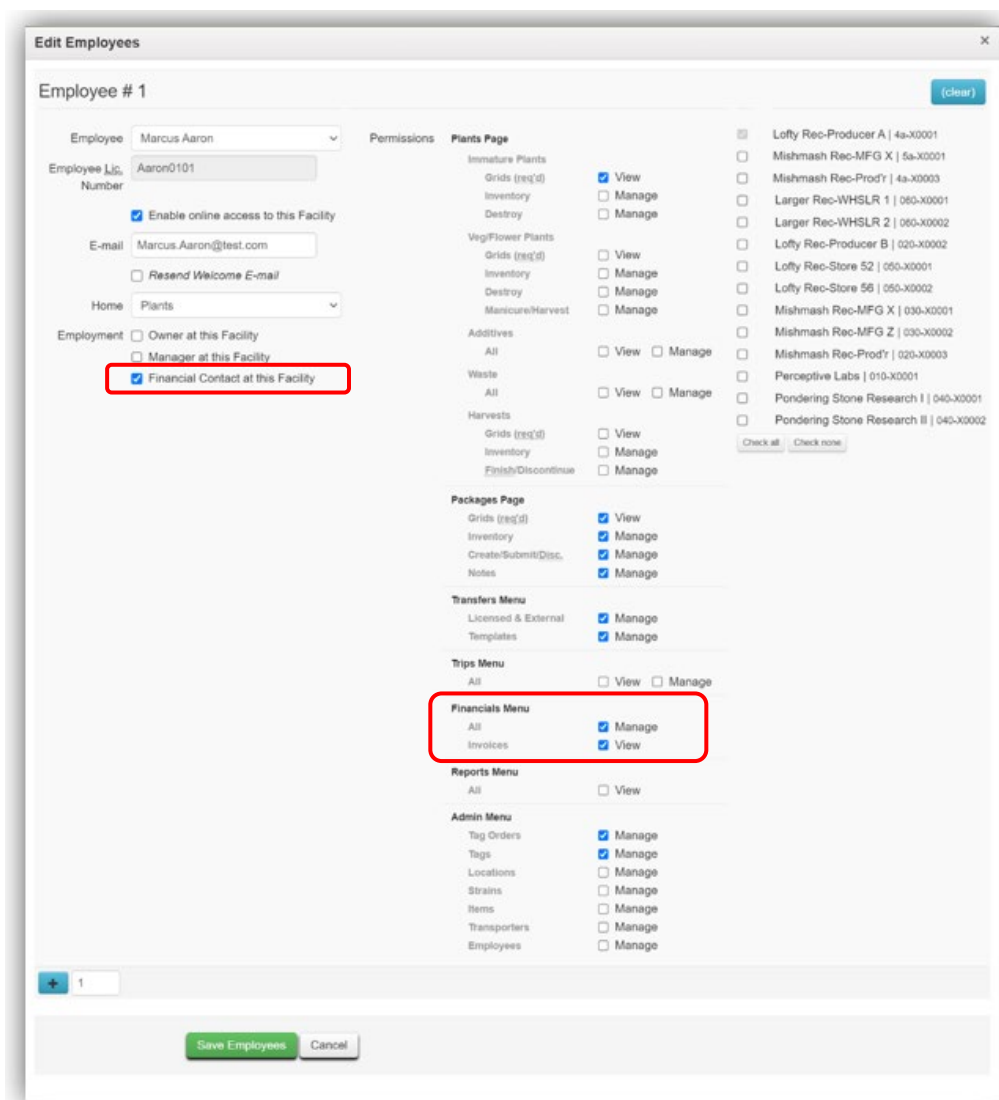


Figure 3: Edit Employees action window and financial permissions

Invoices grid

Once this new functionality is released, monthly invoices for standard reporting fees will be accessible in the Metrc system, including open and closed invoices, which can be viewed and/or managed by employees with appropriate financial permissions through the Invoices grid.

To access the Invoices grid, click on the Financials area dropdown on the navigational toolbar and select the Invoices option – see Figure 4.

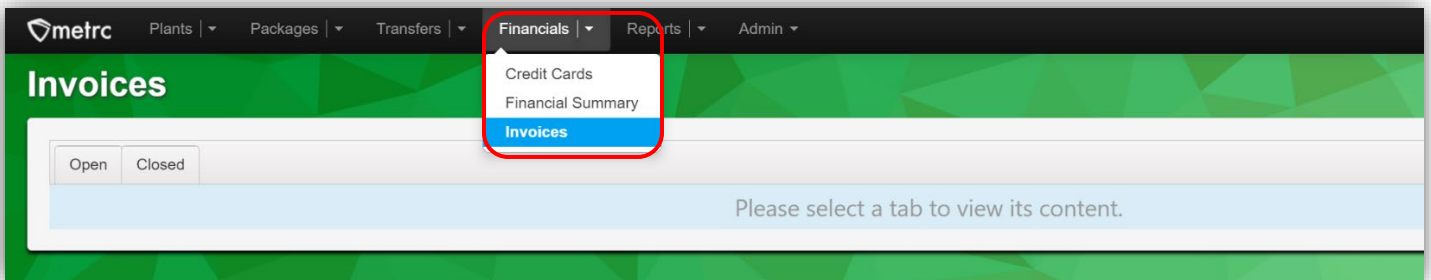


Figure 4: Navigating to the Invoices grid

Once on the Invoices grid, to view open invoices with unpaid balances, select the Open tab. In Open Invoices, the Invoice Number, Coverage Period, Invoice Date, Status, Due Date, Term, Balance, Price will be visible, along with Invoice and Payment action buttons – see Figure 5.

When the Payment action button is selected, the Credit Card action window will appear.

For more information, review the 'Payment options reminder' section of this bulletin.

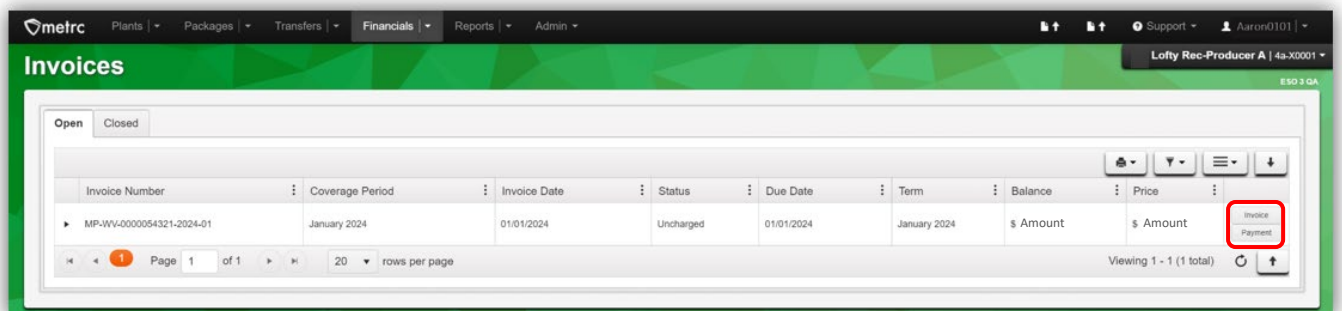


Figure 5: Open Invoices grid

To view closed invoices with fully paid balances, select the Closed tab. While the Closed Invoices grid will look like the Open Invoices grid, the only difference will be the absence of the Payment button and the list of paid invoices will be visible – **see Figure 6.**

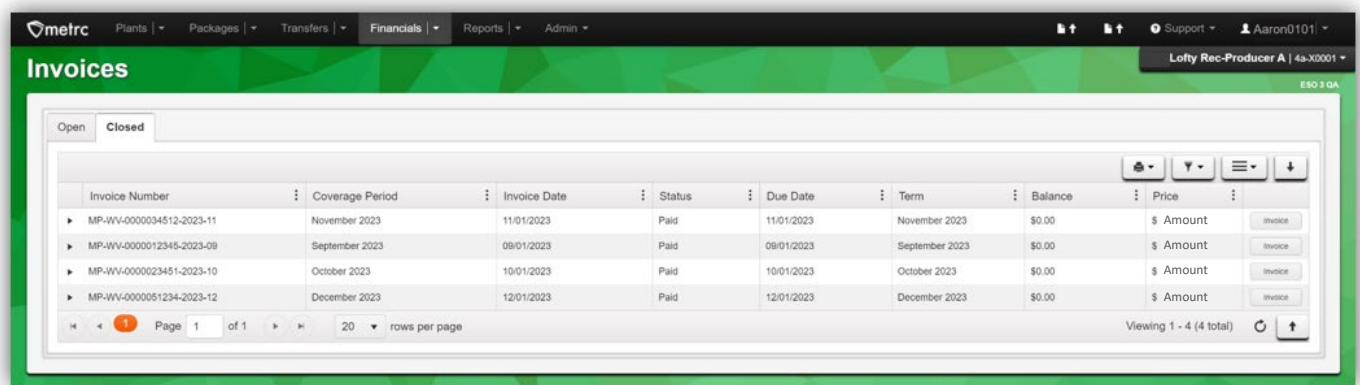


Figure 6: Closed Invoices grid

To view paid invoice details from the Closed Invoices grid, click the dropdown arrow in the proper Invoice Number row to expand paid invoice details – **see Figure 7.**

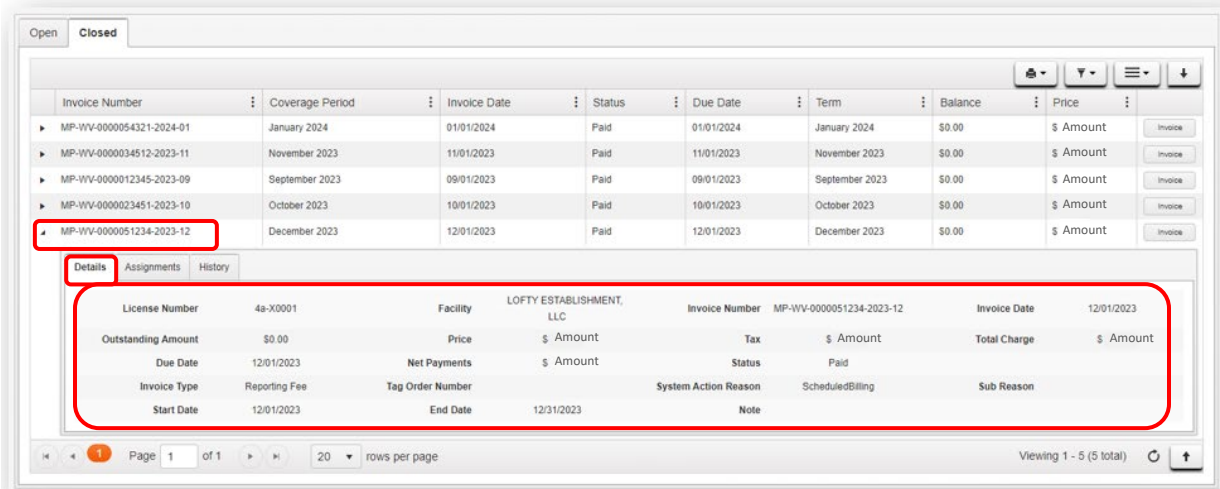


Figure 7: View closed invoice Details

In addition to invoice details, additional information can be found by selecting the Assignments and History tabs – **see Figures 8 and 9 below.**

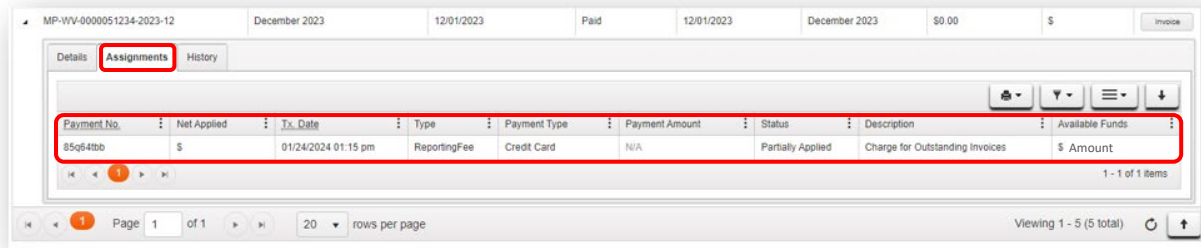


Figure 8: View closed invoice Assignments

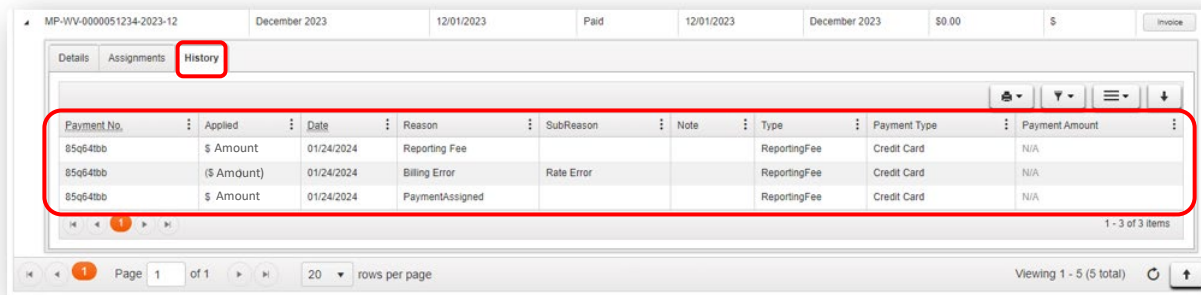


Figure 9: View closed invoice History

To view, download, and/or print a closed (paid) invoice, click on the Invoice button for the proper Invoice Number row in the far right – see Figure 10.

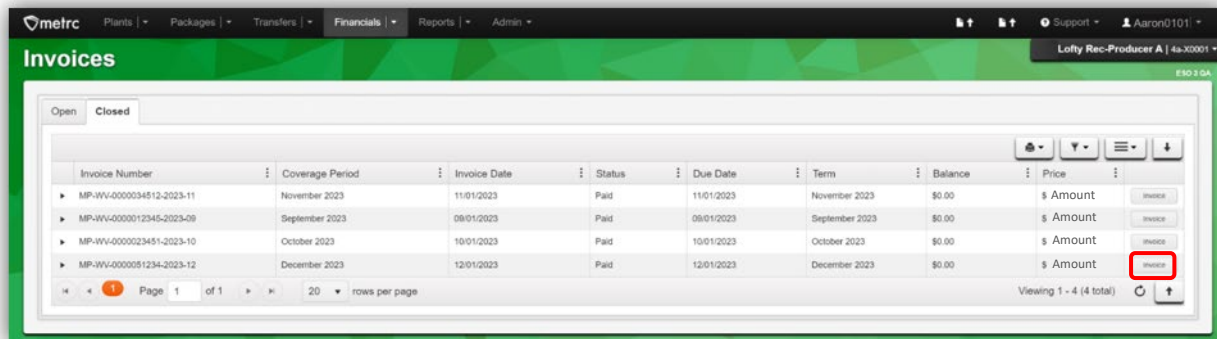


Figure 10: Access closed (paid) invoice to view, download, and/or print

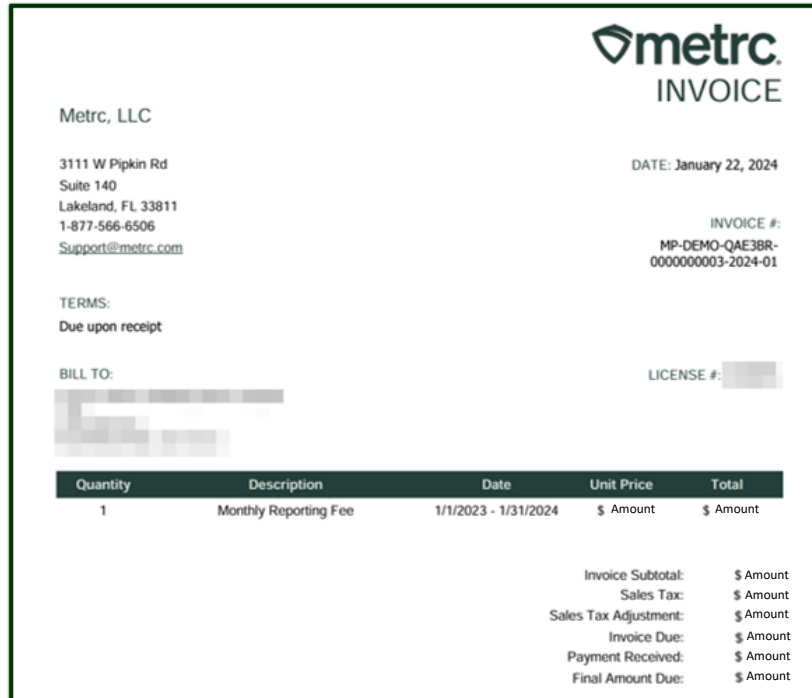
Invoices overview

The information provided below is important to understand as it relates to invoices, including what will be visible, or may be visible, depending on account status.

- Beginning on the first day of the first full calendar month, an invoice will be generated in the Open invoices tab in the Invoices grid and show the total amount due for that period, including the Metrc reporting fee and any applicable taxes as defined by state and local taxing authorities.
- The generation of a monthly invoice will automatically occur in the system on the first day of every month.
- Sales tax assessment is enabled, so Metrc will now be able to calculate applicable sales tax on the monthly reporting fee.

For periods prior to the release of this new functionality, the following will apply:

- For previously paid periods (balances are paid in full), invoices will not be retroactively created or show up in the Closed Invoices tab of the Invoices grid.
- For previously unpaid periods, a single invoice will be generated that reflects the entire amount owed to Metrc at the time of this functionality release and will appear in the Open Invoices tab of the Invoices grid. *See example invoice below.*



Important note: Access to invoices, and the ability to download and/or print, will be available from the Invoices grid. Direct access will offer greater efficiencies, including real-time ability to view and/or manage invoices in a singular location and limit incoming or outgoing communications to/from Metrc.

Recommendation: Designate additional financial managers so that all appropriate employees can access invoices and/or make payments.

Financial Summary

If payments are received in advance of monthly reporting fees being due or an approved credit is issued by Metrc, the new Financial Summary grid will offer real-time account status into Available Credits.

To access the Financial Summary grid, go to the Financials area dropdown on the navigational toolbar and select the Financial Summary option – **see Figure 11.**

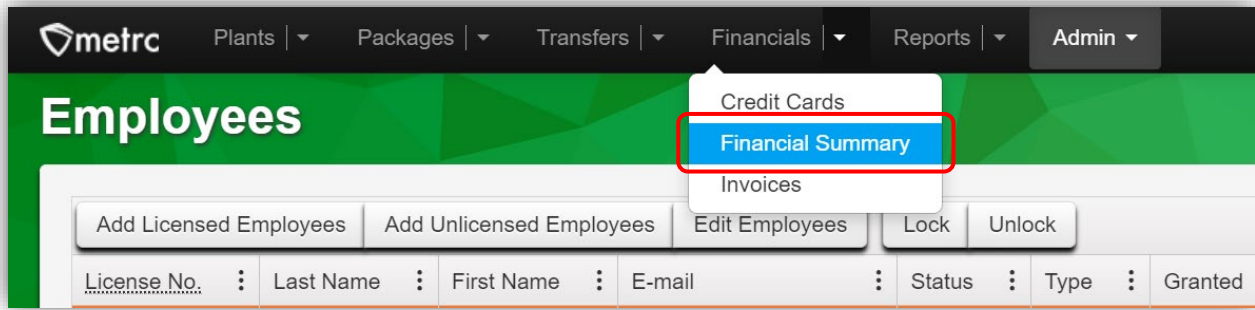


Figure 11: Navigating to the Financial Summary grid

The Available Credits in the Financial Summary grid will display any available credits that are available to apply to future monthly Metrc fees. If the account is up to date, Available Credits will display \$0.00. The Financial Summary page will not display late payments or negative amounts – see **Figure 12**.

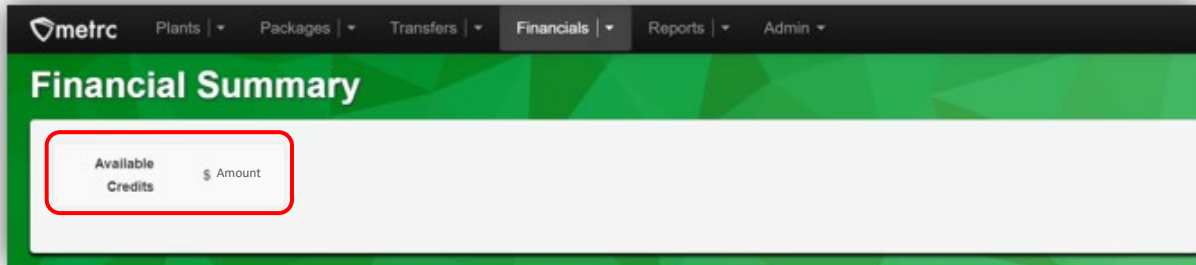


Figure 12: Available Credits in Financial Summary grid

Payment options reminder

Maintaining a valid payment method on file to pay for all incurred and recurring Metrc fees will simplify payment processes. Two payment options are available:

Pay by credit card – Recommended

To review, update, or add a credit or debit card, select the Financials dropdown in the navigational toolbar, then select Credit Cards – see **Figure 13**.

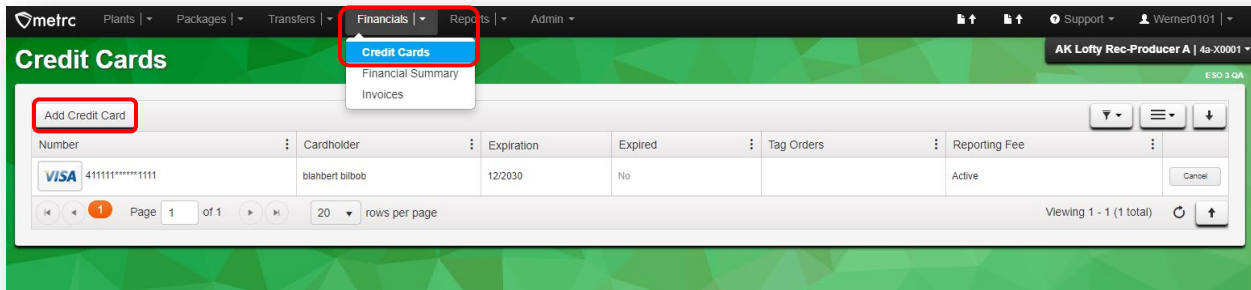


Figure 13: Credit Cards grid

To add a new card for one or more facilities, select the Add Credit Card button to open the Add Credit Card action window. Complete all required information, including selection of facilities to receive the same credit card details and checkbox option(s) to use the credit card for Industry Reporting Fees going forward, or availability for Tag Orders, if enabled. When complete, click the Save Credit Card button – **see Figure 14.**

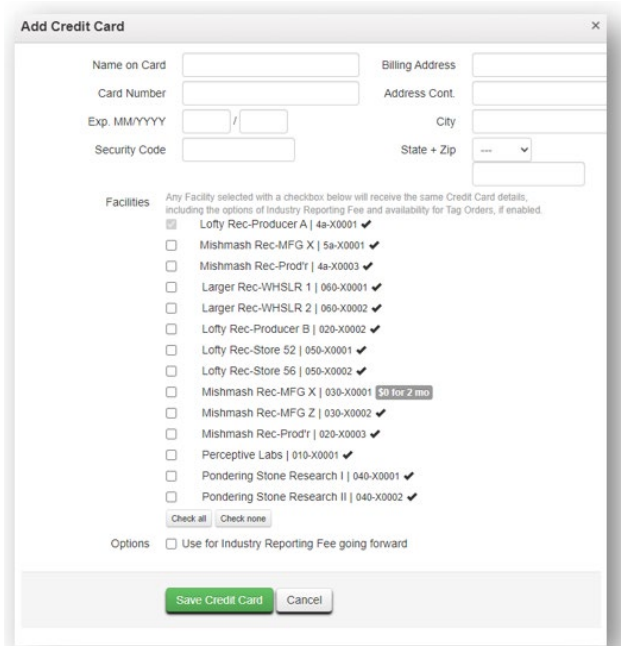


Figure 14: Add Credit Card action window

In addition, payments can be made via check or money order and sent to the following address:

Metrc LLC
 4151 South Pipkin Rd.
 Lakeland, FL 33811

Reporting Fee Notifications

Metrc considers every unique license number that is (a) credentialed in the system, and (b) in an “Active” status as set forth by the state’s rules for any 1 day of any 1 month as having a financial liability for the license for that period, regardless of the business’s use or non-use of the system so that the state may report on that license’s existence.

Please read on for more details regarding what you may experience in Metrc if your license is past due on payment(s).

Metrc system banner notification:

Once a licensed facility is past due on payment to Metrc, an in-system banner will appear notifying licensed employees of past due payment and date payment was due – see **Figure 15**.

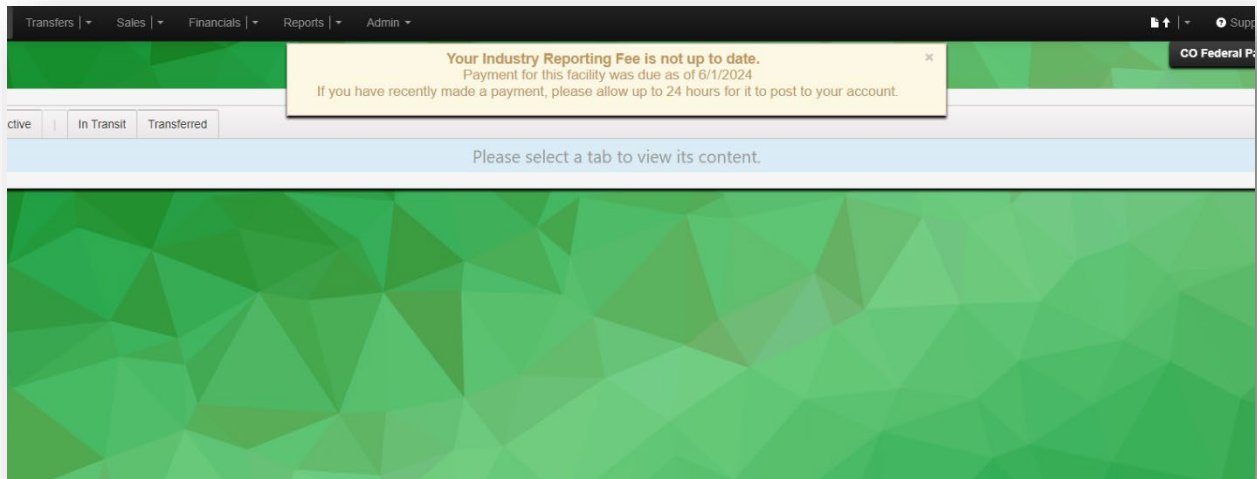


Figure 15: Industry Reporting Fee past due banner

This banner will remain enabled until all payments are made current and acts as a notification prior to tag orders and Metrc Support access being suspended – see more information below.

Tag Orders:

Once a licensed facility is 90 days past due on payment to Metrc, plant and package tag orders will be suspended until payments are made current. Metrc users will experience a locked tag order screen – see **Figure 16 below**.

New Tag Order ×

Order Details

Facility License	CO LOFTY ESTABLISHMENT, LLC 403-X0001	Medical Plant Tag	2000	(\$0.4500 ea., -210 max.)	\$0.0000
Physical Address	N/A	Medical Package Tag	2000	(\$0.2500 ea., -145 max.)	\$0.0000
Subtotal					\$0.00

Shipping Details

Contact Name: METRC INDUSTRY ADMIN
Phone No.: +1-123-456-7890
Copy from: Facility
Ship Address: 555 Main St
Address Cont.:
City: COI
State + Zip: CO 33333

* Tags cannot be shipped to P.O. Boxes

Calculate Total ▾

Shipping/Handling	--
Taxes	--
Total Amount	--

Payment methods

Credit card

Check or Money Order

Figure 16: Tag Order Screen – Locked

In addition, an error message will populate when a user attempts to place a new tag order – see **Figure 17**.

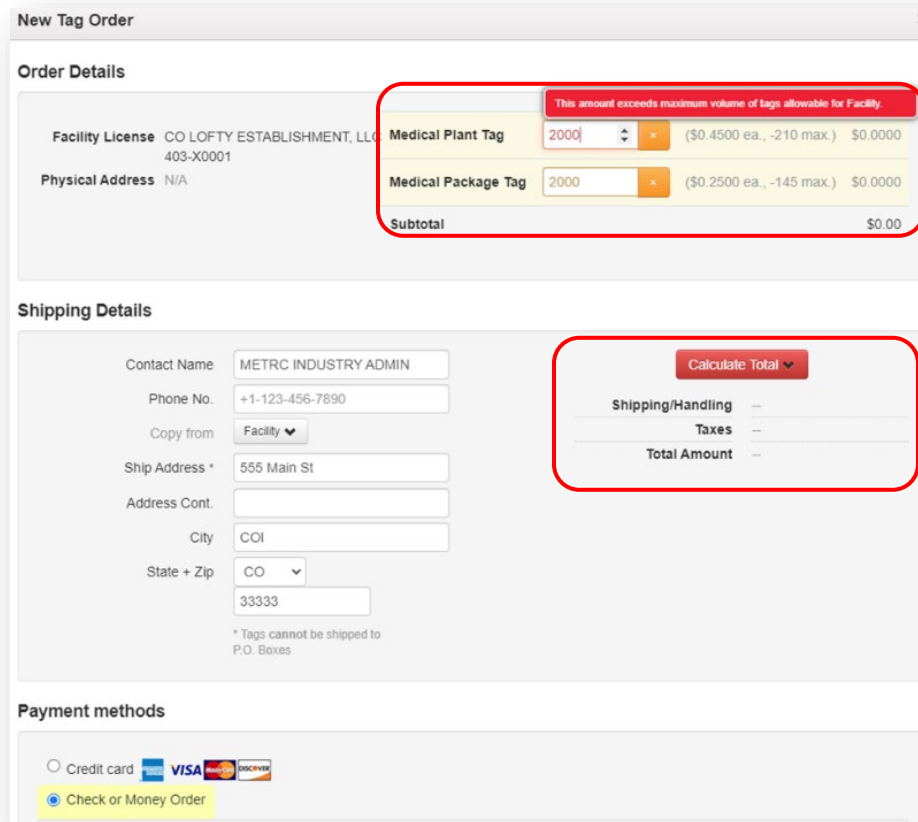


Figure 17: Tag Order Screen Error – Locked

Once all payments are made current, the tag order screen will be unlocked, and tag ordering can resume – see **Figure 18** below.

Order Details

<p>Facility License CO LOFTY ESTABLISHMENT, LLC 403-X0001</p> <p>Physical Address N/A</p>	<table border="0" style="width: 100%;"> <tr> <td style="width: 40%;">Medical Plant Tag</td> <td style="width: 15%;">Count <input type="text"/></td> <td style="width: 15%;">(\$0.4500 ea., 5,000 max.)</td> <td style="width: 30%; text-align: right;">\$0.0000</td> </tr> <tr> <td>Medical Package Tag</td> <td>Count <input type="text"/></td> <td>(\$0.2500 ea., 5,000 max.)</td> <td style="text-align: right;">\$0.0000</td> </tr> <tr> <td colspan="3">Subtotal</td> <td style="text-align: right;">\$0.00</td> </tr> </table>	Medical Plant Tag	Count <input type="text"/>	(\$0.4500 ea., 5,000 max.)	\$0.0000	Medical Package Tag	Count <input type="text"/>	(\$0.2500 ea., 5,000 max.)	\$0.0000	Subtotal			\$0.00
Medical Plant Tag	Count <input type="text"/>	(\$0.4500 ea., 5,000 max.)	\$0.0000										
Medical Package Tag	Count <input type="text"/>	(\$0.2500 ea., 5,000 max.)	\$0.0000										
Subtotal			\$0.00										

Shipping Details

<p>Contact Name <input type="text" value="METRC INDUSTRY ADMIN"/></p> <p>Phone No. <input type="text" value="+1-123-456-7890"/></p> <p>Copy from: <input type="text" value="Facility"/></p> <p>Ship Address * <input type="text"/></p> <p>Address Cont. <input type="text"/></p> <p>City <input type="text"/></p> <p>State + Zip <input type="text" value="---"/> <input type="text"/></p> <p style="font-size: small;">* Tags cannot be shipped to P.O. Boxes</p>	<table border="0" style="width: 100%;"> <tr><td>Shipping/Handling</td><td style="text-align: right;">--</td></tr> <tr><td>Taxes</td><td style="text-align: right;">--</td></tr> <tr><td>Total Amount</td><td style="text-align: right;">--</td></tr> </table>	Shipping/Handling	--	Taxes	--	Total Amount	--
Shipping/Handling	--						
Taxes	--						
Total Amount	--						

Payment methods

Credit card

Check or Money Order

Figure 18: Tag Order Screen - Unlocked

Access to Metrc Support:

Once a licensed facility is 90 days past due on payment to Metrc, access to Metrc Support will be suspended until payments are made current. Please note the following:

- **Payment inquiries:** If you need help with processing the past due payments, Support is available to assist with that specific request.
- **Password Reset assistance:** Metrc Support will continue to provide Password Reset assistance. This applies to all licensed businesses regardless of payment status.

If you are unsure if your license is past due on payments, you can also request that your Admin or financial user log in to Metrc to review payment status and to make sure a current form of payment is on file.

Metrc resources

If you have any questions or need additional support, the following resources are available:

Contact Metrc Support

By using the new full-service system by navigating to Support.Metrc.com, or from the Metrc System, click Support and navigate to support.metrc.com and it will redirect to the portal.

Please note: If accessing the portal for the first time, a username (which is established when logging in), the respective state and “Facility license number”, and a valid email to set a password are required.

Metrc Learn

Metrc Learn has been redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies. Accessing the new [Metrc Learn](#) LMS is simple through multiple convenient locations:

From within the Metrc system

Navigate to the Support area dropdown on the navigational toolbar and select “Sign up for Training” to register.

From the Metrc website

Navigate to your [state’s partner page](#) and scroll down to the “Metrc’s Training Resources” section to find the link.

Also, save the link – learn.metrc.com – as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

Thank you for your continued partnership.