

Bulletin Number: RI_IB_0007	Distribution Date: 04/13/23	Effective Date: N/A
Contact Point: <a href="mailto:support@metrc.com">support@metrc.com</a>	Subject(s): Creating Test Sam	ples and Reserve/Duplicate Test
	Samples	

Greetings Metrc Users,

This bulletin is intended to clarify the process for creating and submitting test samples and reserve/duplicate samples for testing in Metrc. Please contact Metrc Support if you have any questions.

#### Test Samples vs Reserve/Duplicate Samples

Test samples must be created from the correct source package and transferred from the license where the source package is located. Also, all Test sample packages must be created using the "Submit for Testing" button.

Please follow the process below when creating a test sample:

#### Test sample of useable marijuana after it has been packaged into a package:

- When creating a test sample for a specific raw plant material package, create the test sample as a test sample package using the "Submit for Testing" button. The item name for the test sample will be identical to the source package that the test sample is sampled from.
- 2. See below for step-by-step instructions on creating a test sample in Metrc.

#### Test sample of a Production Batch of Concentrate, Infused Edible, or Infused Non-Edible:

- 1. When creating a **test sample** from a production batch, create the test sample using the "Submit for Testing" button. The item name for the test sample will be identical to the source production batch package the sample is pulled from.
- 2. See below for step-by-step instructions on creating a test sample in Metrc.



## **Creating a Test Sample**

When creating a test sample, first select the source package, then select the "Submit for Testing" button as shown in **Figure 1**. This is the same process for all test samples being created for testing. This will open an action window.

Packages						
Active On Hold Inactive	In Transit					
New Packages Submit for Testi Change Locations Change Ite	-	1	ings New <sup>-</sup> just Change	Transfer	inish	
Tag	Src. H's	Src. Pkg's	Location :	Item :	Category :	Item Strain
► Q III 1A4FF0100000C90000003	7 Metrc Bliss 111622		Vault	Metrc Bliss - Buds	Bud/Flower	Metrc Bliss

Figure 1: Select Source Package & Submit for Testing button to create a Test Sample

Once the action window is open, indicate the new test sample tag number, location, item name, the quantity, and the package date. The next step is the selection of the "Required Testing" Lab Test Batch. In this step, check the box that matches the product type of the source package and testing being done. This will indicate to the Testing Facility which Test Types are required for the test sample. In our example in **Figure 2** shown below, it shows that for the "Metrc Bliss - Buds" test sample, the test batch of "Raw Plant Material" should be selected.



Submit for Te	esting					
New Packa	age Sample # 1					(clear)
New Tag	1A4FF01000006500000080	٩		Package # 1	1A4FF03000006500000002	۹ 🖸
Location	Packaging Room	Q			Current Lab Testing State: Not Sub	mitted
Location				Quantity	12.5 0 - Select -	~
ltem	Metrc Bliss - Buds	Q,			Please select a Unit of Measure.	
	Same Item			(contents)		
Quantity	12.5 Crams	~ Σ				
Note						
Package Date	■ 04/07/2023	today				
Required	Infused Edible					
Testing	Infused Non-Edible					
	Infused Pre-Rolls					
	Non-Solvent Concentrate					
	R&D Testing - Metals (Concent	rates/E	dracts)			
	R&D Testing - Metals (Raw Pla					
	R&D Testing - Microbials - Bile-					
	<ul> <li>R&amp;D Testing - Microbials - E.co</li> </ul>		Coramentogativo Duotona			
	R&D Testing - Microbials - Saln     R&D Testing - Microbials - Teta					
	R&D Testing - Microbials - Tota     Robert Testing - Microbials - Tota					
	R&D Testing - Microbials - Tota					
	R&D Testing - Pesticides (Cond — — — — — — — — — — — — — — — — — — —					
	R&D Testing - Pesticides (Raw –					
	R&D Testing - Potency (Infuse)					
	R&D Testing - Potency (Raw P	lant Ma	erial & Concentrates/Extracts)			
	R&D Testing - Residual Solven	ts				
	R&D Testing - Terpenes (Infus)	ed Prod	ucts)			
	R&D Testing - Terpenes (Raw	Plant M	aterial & Concentrates/Extracts)			
	R&D Testing - Total Yeast and	Mold				
	R&D Testing - Water Activity					
	Raw Plant Material					
	Raw Pre-Rolls (Bulk)					
	Raw Pre-Rolls (Final Form)					
	Retest - Metals (Concentrates)	/Extract	s)			
	Retest - Metals (Raw Plant Ma	terial)				
	Retest - Microbials - Bile-Tolera	ant Gra	n-Negative Bacteria			
	Retest - Microbials - E.coli		-			
	Retest - Microbials - Salmonell	а				
	Retest - Microbials - Total Colif	orms				
	Retest - Microbials - Total Viab		nic Bacteria			
	<ul> <li>Retest - Microbials - Total Yeas</li> </ul>					
	Retest - Pesticides (Concentra					
	Retest - Pesticides (Raw Plant					
	Retest - Residual Solvents	materie	<i>iy</i>			
	Solvent Based Concentrate/Ex	tra at				
	Sub-Contract (All)	au				
+ 1 0						
Creating Sample More Info	Packages immediately locks out the so	ource Pa	wage(s) by setting the Testing State t	to SubmittedForTes	ting.	
	Submit for Testing	Cance				
	Submit for resulting	Cance	·			

Figure 2: Select Required Test for Package Based on Item Type



In **Figure 3** below, the "Brownies 40mg" test sample shows as the required Lab Test Batch of "Infused Edible" that is selected.

Submit for Te	esting																×
New Packa	age S	ample	# 1													(cli	ar)
New Teo	10.48	EE0100000	065000000	20	0				Package # 1	1 144	EE010	0000	06500	0000062	Q	•	
												e: Not Sub					
Location	Pack	aging Roo	m		٩					Quantity				Each		V	
	🗹 Sa	me Item								auditury	_				be 97 ea	Ť	
Quantity	2	0	Each		~ Σ					(contents)		anng -	new	total will	be or ea		
Note						_				(00110110)							
Package Date		04/07/20	23 🗂	1	today												
Required		used Edible		i.													
	🗆 No	n-Solvent	Concentrate														
	🗆 R&	D Testing -	Metals (Con	centr	ates/E	xtracts	)										
	🗆 R&	D Testing -	Metals (Rav	Plar	nt Mater	rial)											
	🗆 R&	D Testing -	Microbials -	Bile-	Toleran	t Gram	-Negative I	Bacteria									
	🗆 R&	D Testing -	Microbials -	E.col	li												
	🗆 R&	D Testing -	Microbials -	Salm	onella												
	🗌 R&	D Testing -	Microbials -	Total	Colifor	ms											
	🗆 R&	D Testing -	Microbials -	Total	Viable	Aerobi	ic Bacteria										
	R&D Testing - Pesticides (Concentrates/Extracts)																
		R&D Testing - Pesticides (Raw Plant Material)															
	R&D Testing - Potency (Infused Products)																
	R&D Testing - Potency (Raw Plant Material & Concentrates/Extracts)																
		-															
						aterial &	& Concentr	ates/Extrac	cts)								
					lold												
				ty													
	_		· · ·														
					Extract	e)											
			1 C C C C C C C C C C C C C C C C C C C			3)											
Note         Package Date         Q 4/07/2023         Loday         Required         Infused Pre-Rolls         Non-Solvent Concentrate         R&D Testing - Metals (Concentrates/Extracts)         R&D Testing - Metals (Raw Plant Material)         R&D Testing - Microbials - Bile-Tolerant Gram-Negative Bacteria         R&D Testing - Microbials - Salmonella         R&D Testing - Microbials - Total Olforms         R&D Testing - Microbials - Total Viable Aerobic Bacteria         R&D Testing - Pesticides (Raw Plant Material)         R&D Testing - Pesticides (Raw Plant Material)         R&D Testing - Pesticides (Raw Plant Material & Concentrates/Extracts)         R&D Testing - Potency (Infused Products)         R&D Testing - Terpenes (Infused Products)         R&D Testing - Terpenes (Raw Plant Material & Concentrates/Extract         R&D Testing - Terpenes (Raw Plant Material & Concentrates/Extract         R&D Testing - Total Yeast and Mold         R&D Testing - Water Activity         Raw Pre-Rolls (Final Form)         Retest - Microbials - Diale Total Olforms         Retest - Microbials - Total Veast and Mold         Retest																	
Quantity 2																	
				nella													
	Re	test - Micro	obials - Total '	/iabl	e Aerol	bic Bac	teria										
	Re	test - Micro	obials - Total '	/eas	t and M	lold											
	Re	test - Pesti	icides (Conce	ntrat	tes/Extr	racts)											
	Re	test - Pesti	icides (Raw F	lant	Materia	al)											
	Re	test - Resi	dual Solvents														
	🗆 So	lvent Base	d Concentrat	e/Ext	tract												
	🗆 Su	b-Contract	t (All)														
+ 1 0																	
Creating Sample More Info	Packag	jes immediat	tely locks out t	ie so	urce Pao	ckage(s)	by setting	the Testing St	tate to S	SubmittedForTes	sting.						
		_															
		Sub	mit for Testin		Cance												

Figure 3: Selecting Required Test for Infused Edible Test Samples

Please remember to select only the Test Batch that correlates with the product type that is being tested for state required testing. If the incorrect Test Batch is chosen, the product will be <u>locked</u> with a status of Testing in Progress once all test results have been entered by the Testing Facility. If this happens, please contact Metrc Support for next steps. If a test sample is created incorrectly, it needs to be



discontinued. If the incorrect test sample is not discontinued, the product will be locked with a test status of Testing in Progress once all test results have been entered by the Testing Facility. Also, if a test sample is created incorrectly and it is adjusted to zero and finished, then the product will be locked with a test status of Testing in Progress once all test results have been entered by the Testing Facility.

**Note for all Testing Facilities:** If there are test samples in the active packages inventory that are locked after entering all test results, please have your client reach out to Metrc Support with the source package and test sample information for guidance on the next steps as they will need to work with Metrc Support to see how to get their product unlocked.

## **Creation of Reserve/Duplicate Samples**

Reserve/Duplicate Samples must be created and transferred from the correct license where the source package is and must always be created using the "Submit for Testing" button.

Please follow the process below when creating Reserve samples:

#### Reserve/Duplicate sample of useable marijuana after it has been packaged into 10-pound packages:

- When creating a reserve/duplicate sample for a specific raw plant material package, this is done by creating the reserve/ duplicate sample as a **test sample package** from the correct source package. The item name for the reserve/duplicate will be identical to the source package. The "Same Item" box can be selected to use the same item name as the source package being pulled from for the sample.
- 2. Manifest the Reserve/ duplicate sample package to the testing facility that will be testing the sample(s).

# Reserve/Duplicate Testing of Concentrates, Infused Edibles or Infused Non-Edibles from Production Batches:

- When creating a reserve/duplicate sample for a specific concentrate, infused edible, or infused non-edible package, this is done by creating the reserve/duplicate sample as a **test sample package** from the correct source package using the "Submit for Testing" button. The item name for the reserve/duplicate will be identical to the source package. The "Same Item" box can be selected to use the same item name as the source package being pulled from for the sample.
- 2. If R&D testing is to be done on a specific production batch package, create a **test sample package** from the production batch package that contains the product to be submitted for R&D testing using the "Submit for Testing" button. An Item for this purpose will need to be created under the Admin functionality; the item name should begin with "R&D" then the name of the item.
- 3. Manifest the R&D test sample package to the testing facility that will be testing the sample(s).



### Creating a Reserve/Duplicate Sample

When creating a reserve/duplicate sample, first select the source package; then select the "Submit for Testing" button as shown below in **Figure 3**.

Active	On Hold	I	nactive	In	Tran	sit						
-	Packages	-	bmit for To Change	-		nediate ange <u>Rec</u>	Create	1	tings djust	New Finish	Transfer	
Та		5115	Change		:	Item		:	Cate		Item Strain	:
<u>۲</u>		01234	1567000001	13802		Buds - B	lue Dream		Buds		Blue Dream	

Figure 3: Select Source Package & Submit for Testing button to create a Reserve/Retention Sample

This will open up an action window to indicate the new reserve/duplicate sample tag number, location, item name, the quantity, and the package date. In our example in **Figure 4** shown below, it shows that for the "Metrc Bliss - Buds" reserve/duplicate sample, the package being created is a test sample package.



							-					
New Tag	1A4FF010000	00065000000080	Q		Package # 1	1A4FF03000006500000002	٩					
Location	Packaging Ro	om	Q			Current Lab Testing State: Not Subr	nitted					
tem	Metrc Bliss - E	Buds	Q		Quantity	12.5 O - Select -	~					
Ren		5003	~			Please select a Unit of Measure.						
	Same Item				(contents)							
Quantity	12.5 0	Grams	~ Σ									
Note												
Package Date	■ 04/07/2	023	today									
			loody									
	Infused Edib											
resung	Infused Non-Edible											
	Infused Pre-Rolls											
	Non-Solvent Concentrate  D DD Table 1 (Accentrate Concentrate Con											
	R&D Testing	- Metals (Concent	rates/Extr	.)								
	R&D Testing	- Metals (Raw Pla	nt Materia									
	R&D Testing	- Microbials - Bile-	Tolerant G	-Negative Bacteria								
	R&D Testing	- Microbials - E.co	6									
	R&D Testing	- Microbials - Saln	onella									
	RaD resting - Microbials - Samonena											
		- Microbials - Tota		ic Bacteria								
	-	- Pesticides (Cond										
		- Pesticides (Raw										
	R&D Testing - Potency (Infused Products) R&D Testing - Potency (Raw Plant Material & Concentrates/Extracts)											
		- Residual Solvent		oonoonn atoorexit actory								
	-	- Terpenes (Infuse										
				& Concentrates/Extracts)								
		- Total Yeast and I		& Concentrates/Extracts)								
			NUIQ.									
		- Water Activity	_		_							
	Raw Plant M		<u> </u>									
	Raw Pre-Ro											
	Raw Pre-Ro											
		tals (Concentrates/										
		tals (Raw Plant Mat										
		robials - Bile-Tolera	int Gram-I	ative Bacteria								
	Retest - Mic											
		robials - Salmonella										
		robials - Total Colif										
		robials - Total Viab		cteria								
		robials - Total Yeas										
	Retest - Pes	sticides (Concentra	tes/Extrac									
	Retest - Pes	ticides (Raw Plant	Material)									
	Retest - Res	sidual Solvents										
	Solvent Bas	ed Concentrate/Ex	tract									
	Sub-Contrac	ct (All)										
10												
Creating Sample More Info	Packages immedi	ately locks out the so	urce Packa	) by setting the Testing State	to SubmittedForTes	ting.						
-												

#### Figure 4: Creating Reserve Sample

In Figure 5 below, the "Brownies 40mg" reserve/duplicate test sample package being created is a test sample package.



ew Packag	e Sample # 1				(cl	ear
New Tag	1A4FF010000006500000080 Q	Package # 1	1A4FF01	00000065000000062	Q	1
Location	Packaging Room Q		Current La	b Testing State: Not Sub	mitted	Ĩ
	Same Item	Quantity	2	C Each	~	
			Sampling	- new total will be 97 ea		
Quantity	2 ¢ Each ~ Σ	<ul> <li>(contents)</li> </ul>				
Note						
ackage Date 🛛	🖬 04/07/2023 🗂 today					
	Infused Edible					
	Infused Non-Edible					
	Infused Pre-Rolls					
	Non-Solvent Concentrate					
	R&D Testing - Metals (Concentrates/Extracts)					
	R&D Testing - Metals (Raw Plant Material)					
	R&D Testing - Microbials - Bile-Tolerant Gram-Negative Bacteria					
	R&D Testing - Microbials - E.coli					
	R&D Testing - Microbials - Salmonella					
	R&D Testing - Microbials - Total Coliforms					
	R&D Testing - Microbials - Total Viable Aerobic Bacteria					
	R&D Testing - Pesticides (Concentrates/Extracts)					
0	R&D Testing - Pesticides (Raw Plant Material)					
	R&D Testing - Potency (Infused Products)					
	R&D Testing - Potency (Raw Plant Material & Concentrates/Extracts)					
0	R&D Testing - Residual Solvents					
	R&D Testing - Terpenes (Infused Products)					
	R&D Testing - Terpenes (Raw Plant Material & Concentrates/Extracts)					
0	R&D Testing - Total Yeast and Mold					
0	R&D Testing - Water Activity					
	Raw Plant Material					
	Raw Pre-Rolls (Bulk)					
	Raw Pre-Rolls (Final Form)					
0	Retest - Metals (Concentrates/Extracts)					
	Retest - Metals (Raw Plant Material)					
	Retest - Microbials - Bile-Tolerant Gram-Negative Bacteria					
0	Retest - Microbials - E.coli					
0	Retest - Microbials - Salmonella					
	Retest - Microbials - Total Coliforms					
	Retest - Microbials - Total Viable Aerobic Bacteria					
	Retest - Microbials - Total Yeast and Mold					
0	Retest - Pesticides (Concentrates/Extracts)					
0	Retest - Pesticides (Raw Plant Material)					
	Retest - Residual Solvents					
	Solvent Based Concentrate/Extract					
0	Sub-Contract (All)					
- 1 0						
reating Sample Pa	sckages immediately locks out the source Package(s) by setting the Testing State to	SubmittedForTes	ting.			

#### Figure 5: Example of Creating Reserve/Duplicate Test Sample for an Infused Edible

Results for **<u>BOTH</u>** the compliance sample and the duplicate/reserve sample must be entered for the source package to update to "TestPassed" or "TestFailed."

Please feel free to email <u>support@metrc.com</u> or call 877-566-6506 with any questions.