Metrc Support Bulletin

Bulletin Number: CA-IB-2023-006	Distribution Date: 9/21/2023	Effective Date: 9/21/2023
Contact Point: Metrc Support	**Subject:** Trade Sample Designation and Plant Batch Adjustments	
Reason: New functionality and features are now available in Metrc.		

Greetings Metrc® users,

Metrc is pleased to provide information on the latest system enhancements that will be available on 9/21/2023, including:

- Trade Sample Designations on Tested Cannabis and Cannabis Products
- Plant Batch Adjustments

Please read on for more information regarding this new functionality, as well as a refresher on how to record trade samples provided to employees.

Trade Sample Designations on Tested Product

A new feature is now available in Metrc that changes how trade samples are designated on all cannabis and cannabis products that have completed required regulatory compliance testing. This feature is only available to Distributors, Retailers, and Microbusiness licensees and should not be used to designate prior to completion of required regulatory compliance testing.

Should you need to designate cannabis or cannabis products prior to completion of required regulatory compliance testing, continue to designate trade sample packages in Metrc by assigning items pre-fixed with "Trade Sample" as described in Bulletin Number CA_IB_2021_007. Once regulatory compliance testing requirements have been met, Distributor, Retailer, and Microbusiness licenses are required to utilize the new feature described below to designate cannabis and cannabis products as trade samples.

A refresher on how to provide a trade sample to an employee is outlined in the *Providing a Trade Sample to an Employee* section below.

Flagging a Package as a Trade Sample

To designate an <u>existing</u> package of cannabis or cannabis products as a trade sample, on the *Packages* page:
1. Select the package to designate.
2. Click on the *Trade Sample* button, and then select *Flag,* as shown in **Figure 1**.
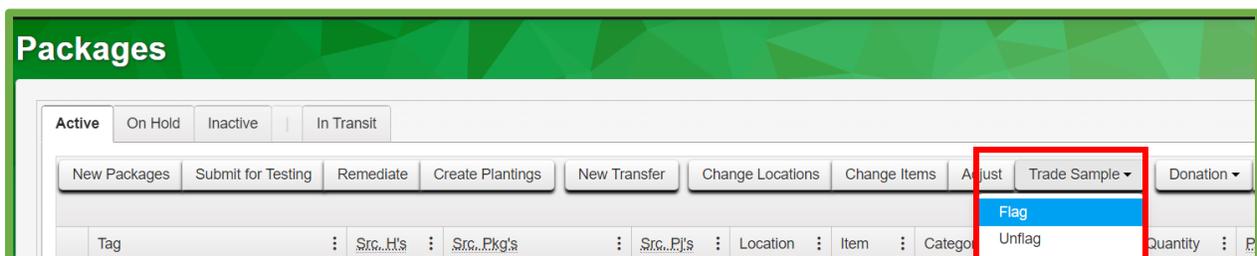
Figure 1: Designating an Existing Package as a Trade Sample

To designate cannabis or cannabis products as a trade sample when creating a <u>new</u> package on the *New Packages* modal, check the *Trade Sample* checkbox, as shown in **Figure 2**.
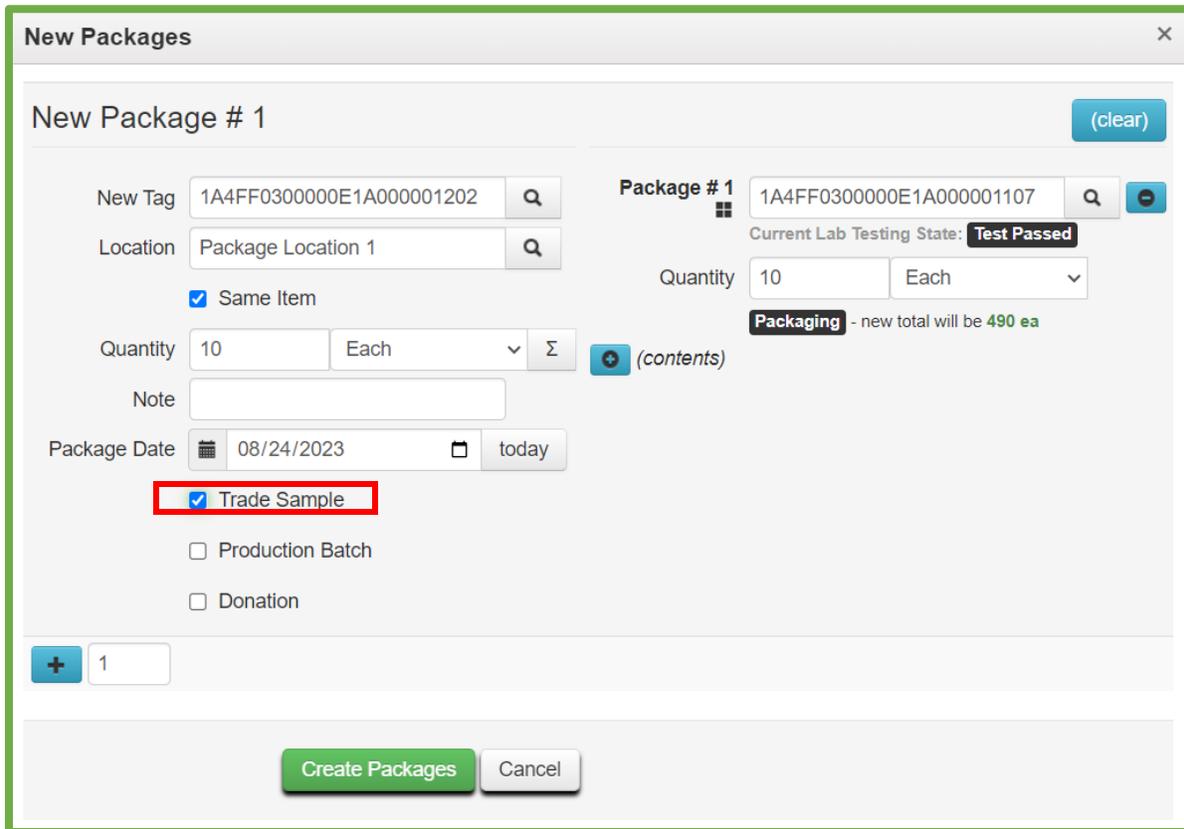
Figure 2: Designating a New Package as a Trade Sample

Identifying Trade Sample Packages

To easily identify trade sample packages in your inventory, a suitcase icon displays to the right of the package Tag ID, as shown in **Figure 3Error! Reference source not found.** below.
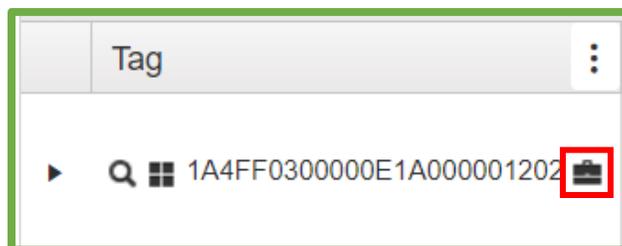
Figure 3: Trade Sample Icon

There is also the ability to identify trade sample packages by adding the *Trade Sample* column as a visible column on the Packages grid. By pressing the three dots on the header of any column and selecting the Columns option, the *Trade Sample* option can be selected, as shown in **Figure 4** below.
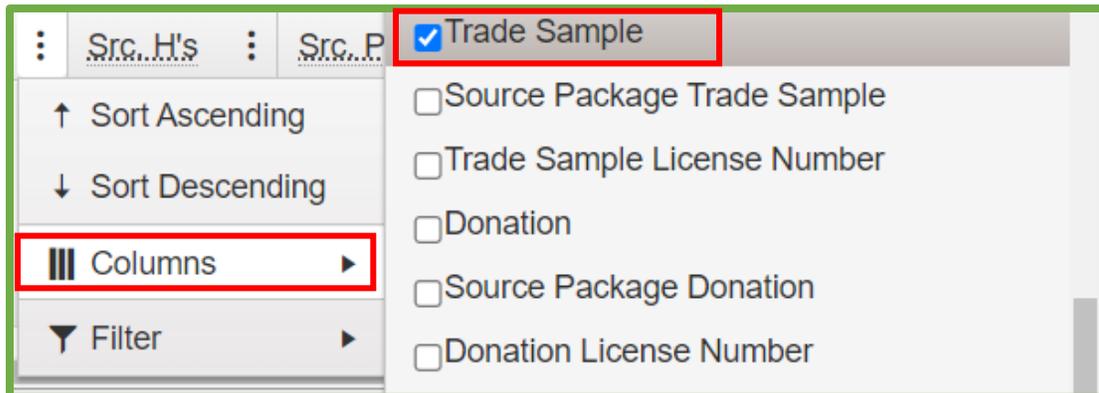
Figure 4: Add Trade Sample Column to Packages Grid

The *Trade Sample* column will be added to the package grid and will be populated with *Yes* for packages designated as trade samples, as shown in **Figure 5** below.

Figure 5: Trade Sample in Packages Grid

Removing a Trade Sample Designation

Only the licensee who designated a package as a trade sample can remove the trade sample designation, but they can only do so if the trade sample package has not yet been transferred and accepted into the inventory of another licensee.

To remove a trade sample designation from a package of cannabis or cannabis products, on the *Packages* page:
1. Select the package with the trade sample designation.
2. Select the *Trade Sample* button, and then select *Unflag* as shown in **Figure 6**.
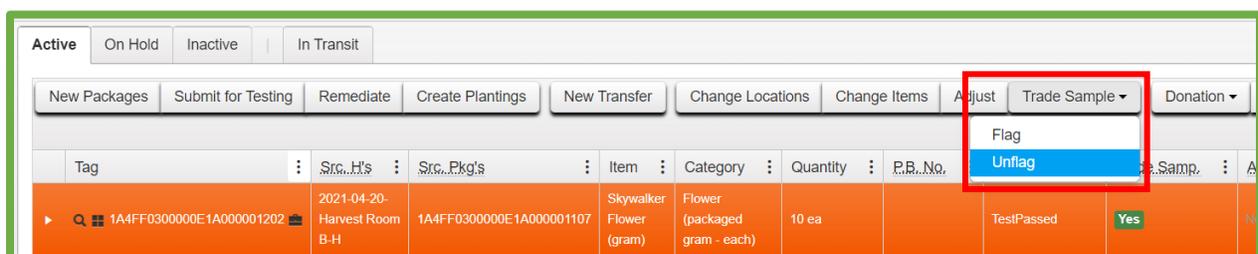
Figure 6: Removing a Trade Sample Designation

Providing a Trade Sample to An Employee

When providing cannabis or cannabis products to employees as trade samples, you must adjust the quantity in the trade sample package and utilize the new *Trade Sample* package adjustment reason.

In addition, you must include the name or licensee-assigned employee number of the employee and the date and time the cannabis or cannabis products were provided to the employee in the *Required Note* field.

Figure 7 below illustrates these two requirements on the *Adjust Packages* action window.
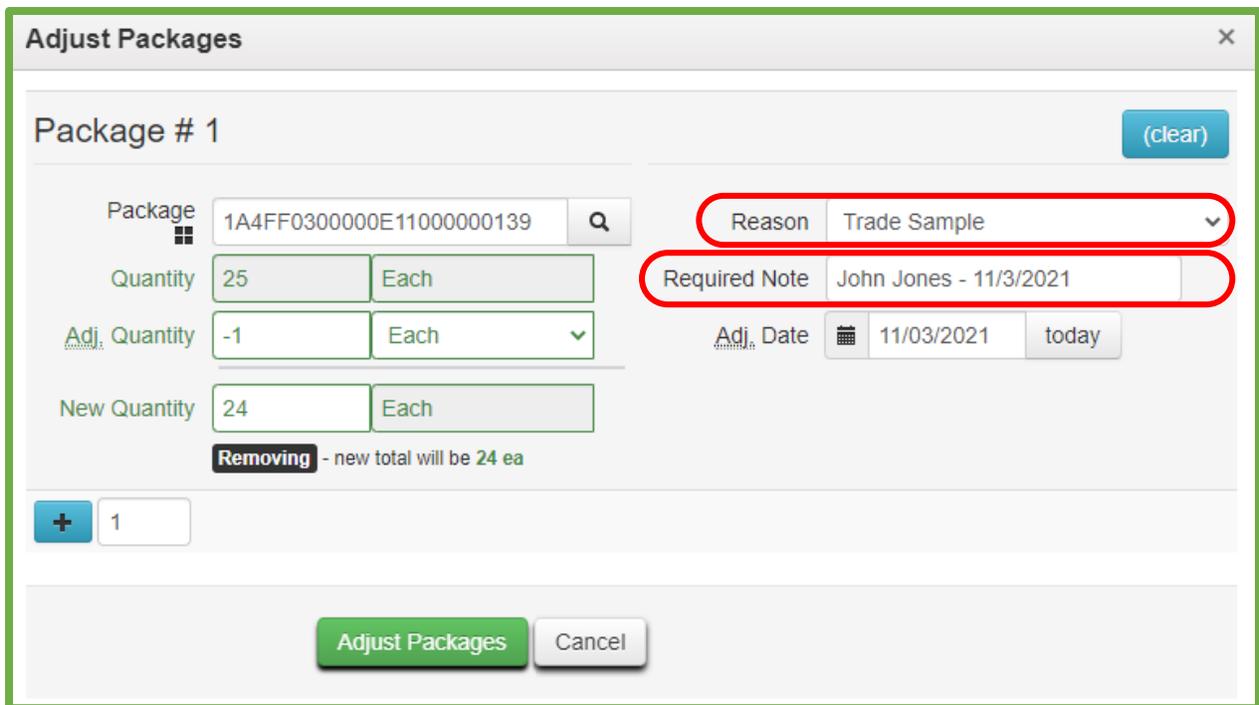
Figure 7: Adjust Packages – Use Trade Sample Reason and Enter Employee Information

Plant Batch Adjustments

Within 72 hours of creating a plant batch, the new *Plant Batch Adjustment* feature allows cultivators to correct the count of immature plants in the batch. When a plant batch adjustment is made, an adjustment is also performed on the package from which the plant batch was created, if applicable.

To adjust a plant batch, highlight the plant batch to be adjusted and select the *Adjust* button above the grid on the *Immature* tab on the *Plants* page, as shown in **Figure 8** below.
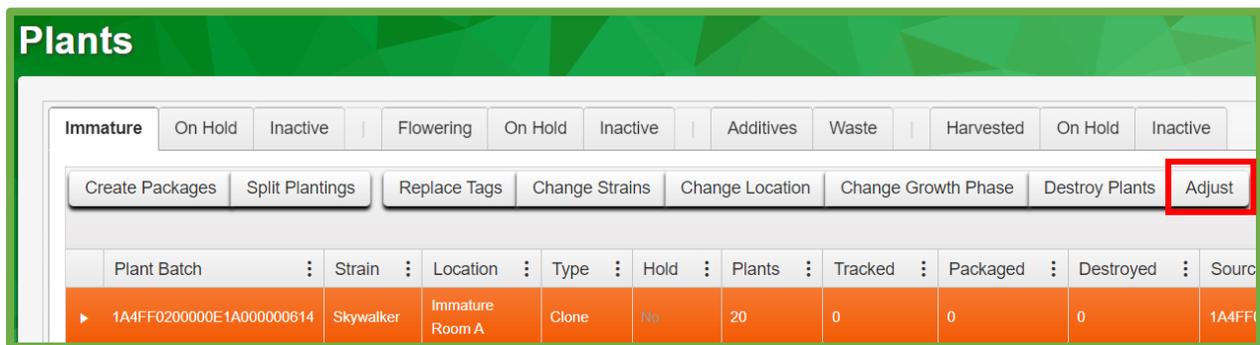
Figure 8: Adjust (Plant Batch) Button

On the *Adjust Plant Batches* modal, shown in **Figure 9** below:

1. Enter either the *Adjustment Quantity* or the *New Quantity*.
   - Values entered in the *Adjustment Quantity* can be positive or negative and the *New Quantity* will be calculated automatically based on this value.
   - Alternatively, a value greater than or equal to zero can be entered in the *New Quantity* field and the *Adjustment Quantity* will be automatically calculated based on this value.
2. Select a *Reason* from the dropdown.
3. Enter an explanation for the adjustment in the *Note* field.
4. Select the *Adjustment Date* using the *Today* button or calendar tool.
5. Click the *Adjust Plant Batches* button when finished.
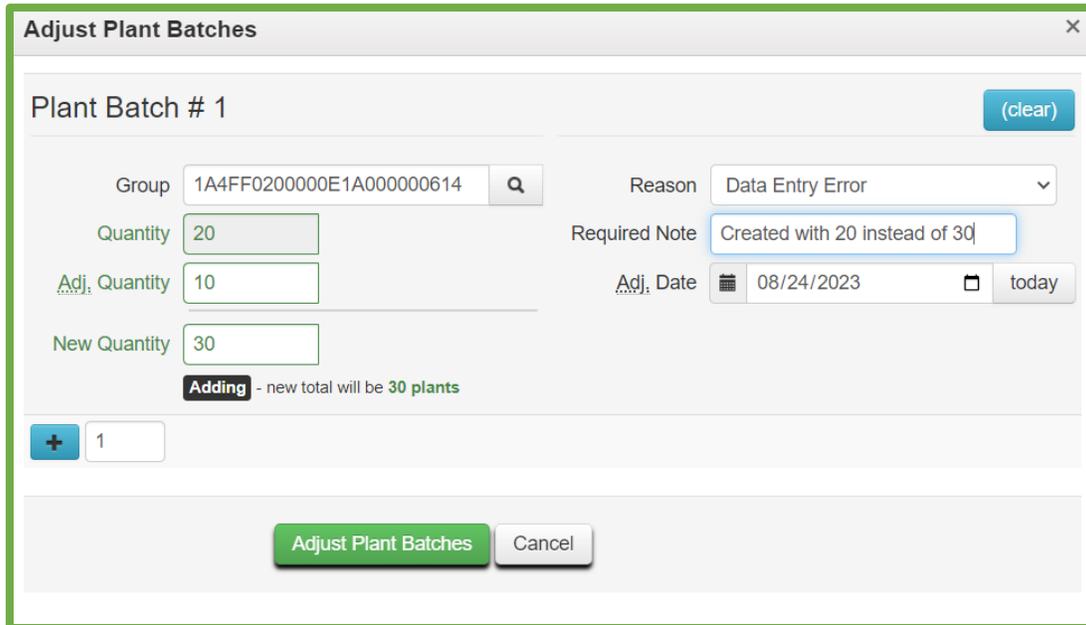
Figure 9: Adjust Plant Batches Modal

If the plant batch was sourced from a package, Metrc will attempt to adjust the source package based on the number of immature plants added or removed from the plant batch. If the package is finished, has been transferred, or is in transit on an active transfer, you will be unable to complete the action. If the source package is finished, you can first unfinish the package and then enter the plant batch adjustment.

<u>Metrc Resources</u>

Additional resources are available in the Metrc system in the Support dropdown located in the upper right corner of the navigational toolbar and can be utilized to access the Metrc Manual/User Guide, California Supplemental Guide, and other helpful information.

In addition, on-demand training is available in Metrc Learn, an interactive learning management system, and the Metrc Knowledge Center, a portal that provides on-demand access to various resource materials, including past bulletins and other helpful links.

If you have questions regarding information included in this bulletin, please contact Metrc Support at 877-566-6506 or support@metrc.com and provide your license # and Metrc username to aid in the inquiry process.