

Bulletin Number:	Distribution Date:	Effective Date:				
MN_IB_0010	09/11/2023 09/11/2023					
Pre-Metrc Returns						
Contact Point: Subject: Guidance for returning products that were sold						
Metrc Support	prior to the Metrc implementation in Minnesota.					
Reason: Metrc, in collaboration with the Minnesota Office of Medical Cannabis, would						
like to provide additional guidance on the process of returning products that were sold						
prior to the Metrc implementa	tion.					

Greetings Metrc® users,

Metrc, in collaboration with the Minnesota Office of Medical Cannabis, would like to provide additional guidance on the process of returning products that were sold prior to the Metrc implementation.

Please read on for more information regarding this process.



#### Processing Pre-Metrc Returns

#### **Prior Workflow for Processing Pre-Metrc**

If a dispensary has pre-Metrc sales returns prior to the implementation of this workflow, the dispensary should send an email to OMC with photos of the returns along with a list of everything that has been returned so far including their approximate quantities (number of items, estimate of % left). Print off a copy of that email and store it with the items in their own pre-Metrc return bin until they are able to be tagged in Metrc. The OMC will respond and then you can begin arranging a time to tag these products in Metrc through an incoming external transfer.

#### **Current Workflow for Processing Pre-Metrc Returns**

When an item is returned to the dispensary that is part of a transaction that took place before Metrc, the dispensary should email OMC photos of the returned items along with a list of the items returned and their approximate quantities (number of items, estimate of % left). Print off a copy of that email and store it with the items in their own pre-Metrc return bin until they are able to be tagged in Metrc. The OMC will respond and then you can begin arranging a time to tag these products in Metrc through an incoming external transfer.

#### Prepare the dispensary to tag Pre-Metrc Sales Returns

Before the Pre-Metrc Sales Return can be tagged in Metrc, the dispensary will need to create an item in Metrc for the return to be tagged under. A dispensary Admin will need to log into Metrc and create an item named "Pre-Metrc Sales Returns" using the item category of "Pre-Metrc Sales Returns". This step only needs to be completed once per dispensary in Metrc. Only dispensary licenses will be able to create items using the item category of "Pre-Metrc Sales Returns". To create a new item, choose the "Items" option under the "Admin" area on the navigational toolbar as shown in **Figure 1**.

ems						Tag Orders Tags	
Add Items	Edit Items					Locations Strains	
Item	:	Category :	Туре :	Quantity Type	Defa	Items	: 5
<ul> <li>CannaDood</li> </ul>	le Cookie - 10mg	Infused Edible	InfusedEdible	CountBased	NotSu	Transporters	
Pre-Metrc S	ales Returns	Concentrate	Concentrate	WeightBased	NotSu	Employees	
<b>K 1</b>	Page 1	of 1 🕨 🕨	20 🔻	rows per page			

Figure 1: Creating an item: "Pre-Metrc Sales Returns"



#### Tagging Pre-Metrc Returns

The OMC will turn on external incoming transfers for the dispensaries that need to tag Pre-Metrc returns for the agreed-upon timespan. Once this has been turned on, someone at the dispensary will log in to Metrc and create a new incoming external transfer and select Pre-Metrc sales returns as the type. In the planned route field, input "N/A Pre-Metrc returns".

The following steps need to be carried out by a person at the dispensary and be logged into Metrc:

1. Log into Metrc and using the dropdown in the upper right-hand corner, select the dispensary processing the return as show in **Figure 2**.

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		MN - Dispensary   D0001 -
		Minnesota Testing

Figure 2: Select the dispensary processing the return

2. Create a new incoming external transfer by selecting the "External" option under the "Transfers" area on the navigational toolbar then choose the "New Transfer" button in the External Transfers grid as shown in **Figure 3** below.



Extern	al Tra	ns <sup>Lia</sup> Te	censed mplates <b>cternal</b>		K			<	
View Man	g ransfer								
Mi	anifest	Origin	:	Туре	:	Pkg's	:	ETD	: /
IVIC								08/31/2023	

Figure 3: Create a new, incoming external transfer

This will open the New Incoming Transfer action window.

- 3. Select Pre-Metrc Sales Returns as the type on the New Incoming Transfer screen.
- 4. In the planned route field put "N/A Pre-Metrc returns."
- 5. Select the Pre-Metrc Sales Returns item for Package #1.
- 6. In the quantity field, put the total number of items being tagged.
- 7. Select the "Register Transfer" button.

This will register the external transfer so it can be completed. These steps are shown in **Figure 4** below.

# 

Туре	Pre-Metrc Sales Retu	ims 🗸			
Phone No.	612-420-7100				
lanned Route	N/A Pre-Metrc Return	5	Est. Departure	B 09/07/2023	today
				^ ^	
				01 : 17 PM	
				* *	
			Est Arrival	■ 09/07/2023	today
				^ ^	
				01 : 17 PM	
			10	· ·	
Paci	kage # 1 Pre-Metrc Sa	iles Returns	Q. (dear) Package Date	B 09/07/2023	today
1	Quantity 5	Grams	~		
0 1	(package)	ransler Cancel			

Figure 4: Registering the Transfer

8. Select the "Complete" button on the External Transfer grid as shown in **Figure 5** below.





Figure 5: Completing the Transfer

- 9. Place a new tag with the items physically and select that tag on the Complete Incoming Transfer screen and select the appropriate location in Metrc. One Metrc tag can be used for all of the Pre-Metrc returns getting tagged in Metrc when being brought in all in the same Incoming External Transfer.
- 10. Then select Complete Transfer.

This will open the "Complete Incoming Transfers" action window. These steps are shown below in **Figure 6** below.

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Manifest	0000005101		Transfer T	Pre-Metrc Sales Retu	irns			
Origin Lic. No.			Origin Na	me				
Main Phone No.	612-420-7100		Mobile Phone	No.				
Phone No. for Questions								
Employee ID			Vehicle Make					
Driver's Name			Vehicle Model					
Driver's Lic. No.			License Plate					
Package # 1	1A4FF01000006700000004	Q	Item Pre	Metrc Sales Returns	Shipped Qty.	5	g	Reject
Location	Transfer Vault	Q			Receive <u>Qty</u>	5	Grams	~
Locaton	Complete Transfer Cancel				Receive <u>Mir</u> .	3	Granis	•

#### Figure 6: Tagging and Completing the Transfer

11. On the active packages grip, select the newly received package tag and select the Change Notes button. Enter a note listing what was returned and the approximate quantities in the package as shown in **Figure 7**.

Ør	netrc	Packages   * Transfers	+ Sales + F	inancials   • Reports   •	<ul> <li>Admin *:</li> </ul>
Pa	icka	ages			
Ī	Active	On Hold Inactive	In Transit		
	New Packages New Transfer		ew Packages New Transfer Change Locations Change Ite		Change Notes Finish
		Tag i	SIC H's	Src. Pkg's	I Src. Pfs I Location I Item I Category I Item Strain I Quantity I PB. No.
	*	Q # 1A4FFD1000008700000003	Custer Kush 062123-2	1A4FF010000006600000027	Change Notes ×
	1	C # 1A4FF010000006700000004			
		Q # 1A4FF01000006500000000	Baby K 71223	1A4FF01000006500000071	Package # 1 (clear)
	100	Q # 1A4FF01000000500000077			
		Q # 1A4FF01000006800000038	Custer Kush 062123-2	1A4FF010000006600000033	Package 1A4FF0100000067000000004 Q Note 5g of Concentrate
		Q # 1A4FF010000000000000000	Custer Kusti 062123-2	1A4FF010000006600000032	
		Q # 1A4FF01000008700000002	Custer Kush 062123-2	1A4FF010000008800000034	
		Q # 1A4FF01000000800000021	Guster Rush 002123-3	1A4FF0100000000000000	
		Q # 1A4FF010000008800000025	Custer Kush 082123-2	1A4FF01000006500000054	Change Notes Cancel
		Q # 1A4FF010000005500000027	Custer Kush 062123-2	1A4FF010000005500000021	
		Q # 1A4FF01000000600000028	Custer Kush 062123-2	1A4FF010000005600000021	Cape any non-use non-use non-use non-use any converses non-
		Q # 1A4FF010000006600000029	Ouster Kush 062123-2	1A4FF010000006600000023	Dispensary Ploor CannaDoode - 100mg Infused Edible 96 ea
		Q # 1A4FF01000005600000030	Custer Kush 062123-2	1A4FF010000006600000023	B Dispensary Floor CannaDoodle - 100mg Infused Edible 100 ea
	*	Q # 1A4FF010000006600000031	Custer Kush 062123-2	1A4FF010000006600000023	B Dispensary Pipor CannaDoodle - 100mg Infused Edible 99 ea
		Q # 1A4FF010000006600000032	Custer Kush 062123-2	1A4FF01000006600000023	Package Vault CannaDoode - 100mg Infused Edible 98 ea

Figure 7: Selecting Newly Received Tag(s) and Changing Notes



12. Email The OMC and let them know you have finished tagging pre-Metrc sales return items. The OMC will then remove the dispensary's ability to create incoming external transfers.

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