Metrc Support Bulletin

Bulletin Number: MN_IB_19 State Approved Waste Returns	Distribution Date: 02/13/2024	Effective Date: 03/01/2024
Contact Point: Metrc Support	**Subject:** Guidance for returning products that were sold prior to the Metrc implementation in Minnesota.	
Reason: Guidance on the process of pre-Metrc returns of products that were sold prior to the Metrc implementation.		

Greetings,

Metrc, in collaboration with the Minnesota Office of Medical Cannabis (OMC), would like to provide additional guidance on the process of product returns that were sold prior to the Metrc implementation.

Please read on for more information regarding this process.

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Processing State Approved Waste Returns

Previous Workflow for Processing Pre-Metrc Returns:
When a dispensary had items returned from sales done prior to the implementation of Metrc, the licensee was instructed to 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). The licensee would then print off a copy of that email and store it with the items in their own pre-Metrc return bin until those items could be tagged in Metrc. The OMC would then respond and begin arranging a time to tag these products in Metrc through an incoming external transfer.

New Workflows for Processing State Approved Waste Returns:
The OMC has created two specific return types to categorize returns. These will be known as Pre-Metrc Sales Returns and Waste Product Returns. Below are the definitions for each return type and the category in which they fall into.

- **Pre-Metrc Sales Returns:** When items that were part of a sale that occurred before the Metrc implementation are returned to the dispensary, 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 can be tagged in Metrc. OMC will respond and begin arranging a time to tag these products in Metrc through an incoming external transfer.

- **Waste Product Returns:** When an item is returned to the dispensary that has a production date of 2023 or later it will need to be tagged in the State Approved Waste Returns category. This category of item needs to be stored separate from the Pre-Metrc Sales Returns.

Preparing to tag Pre-Metrc Sales Returns and Waste Product Returns
Before the returned items can be tagged in Metrc, the dispensary will need to create two new items in Metrc to ensure the product is designated appropriately. As a dispensary Admin, log into Metrc and create one item named "Pre-Metrc Sales Returns" and another item named "Waste Product Returns", both with the item category of "State Approved Waste Returns." This step only needs to be completed once per dispensary in Metrc. Only dispensary licenses will be able to create items under the item categories of "Pre-Metrc Sales Returns" and "Waste Product Returns."

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To create the new Items, start by selecting the Items option in the Admin area drop-down menu on the navigational toolbar – See **Figure 1**.
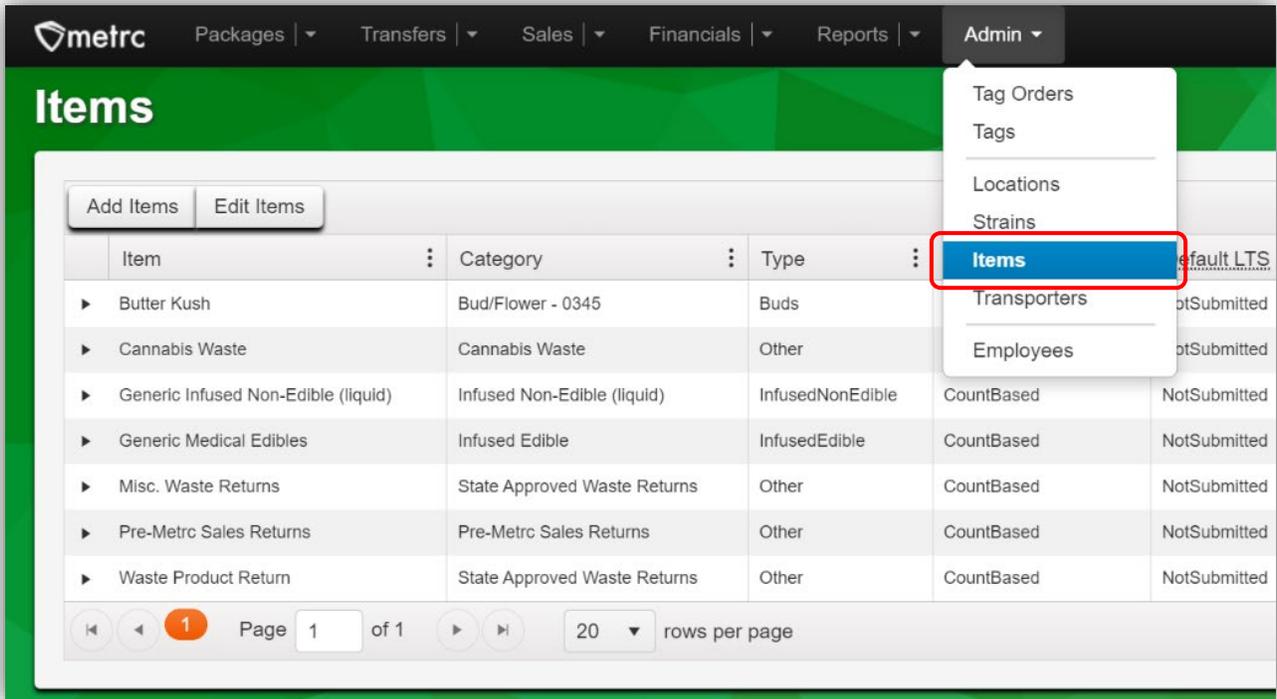
Figure 1: Item Grid to create State Approved Waste Returns items

Next, select the Add Items button in the Items grid to access the Add Items action window – see **Figure 2.**
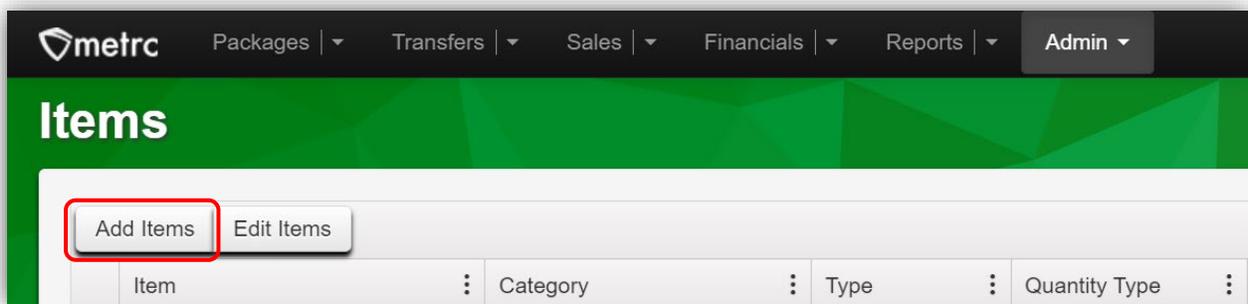
Figure 2: Add Items button

Individually create each of the two new Items required for State Approved Waste Returns: Pre-Metrc Sales Return and Waste Product Return. Both need to be categorized using the State Approved Waste Returns category found in the Category drop-down menu. Once all required information has been entered, select the green Create Items button to create the item – see **Figures 3 & 4.**

Figure 3: Adding Pre-Metrc Sales Returns in Add Item action window

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Figure 4: Adding Waste Product Return in Add Item action window

Once the items have been made, they will be available for use.

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Tagging Pre-Metrc Sales Returns

The OMC will turn on external incoming transfers for the dispensaries that need to tag Pre-Metrc Sales Returns for the agreed upon timespan. During this time, an employee at the dispensary will log in to Metrc and create a new incoming external transfer, selecting State Approved Waste Returns as the type. In the planned route field, input "N/A State Approved Waste Returns".

Once the External Transfers has been enabled by the OMC, take the following steps to complete the returns:

Select the External option in the Transfers area drop-down menu on the navigational toolbar. Choose the Incoming tab, then select the New Transfer button from the External Transfers grid – see **Figure 5**.
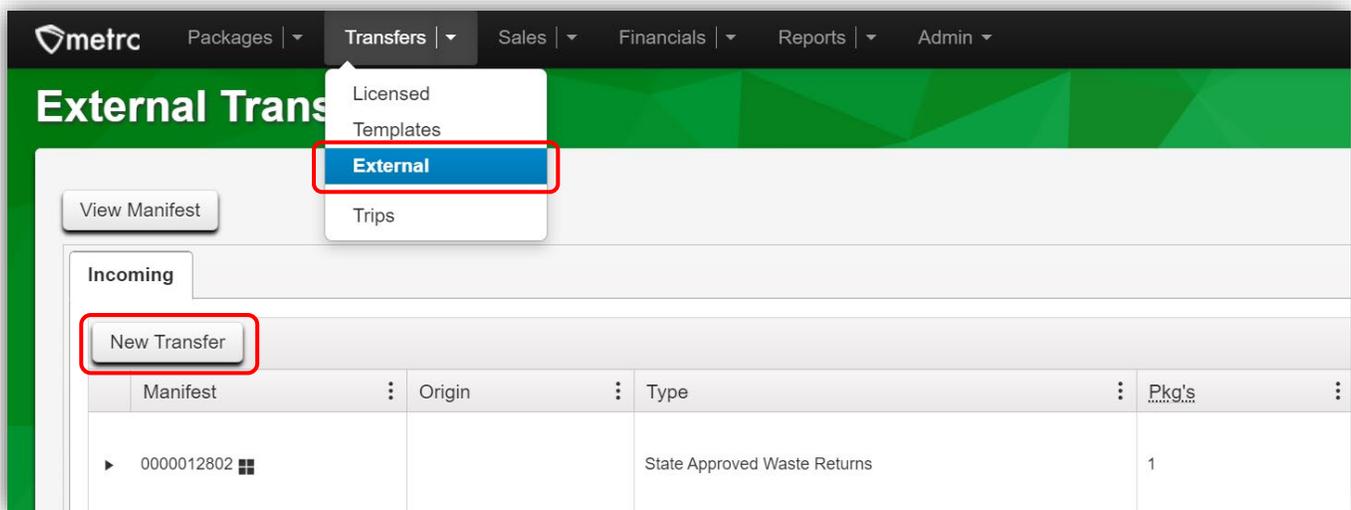
Figure 5: Creating New Incoming Transfer in External Transfers grid

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This will open the New Incoming Transfer action window in order to fill out the required fields for the External Transfer.

- Select State Approved Waste Returns option as the type from the drop-down menu.
- In the planned route field put "N/A Pre-Metrc Returns."
- Select the Pre-Metrc Sales Returns item for Package #1.
- In the quantity field, put the total number of items being tagged.

Once all required fields have been entered, select the green Register Transfer button to register the External Transfer – see **Figure 6.**

Figure 6: Registering the Transfer

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Once the External Transfer has been registered, it will appear on the Incoming Externals Transfers grid and needs to be completed. To do this, select the Complete button on the right side of the External Transfer needing to be completed in the grid. This will open the Complete Incoming Transfer action window – see **Figure 7**.
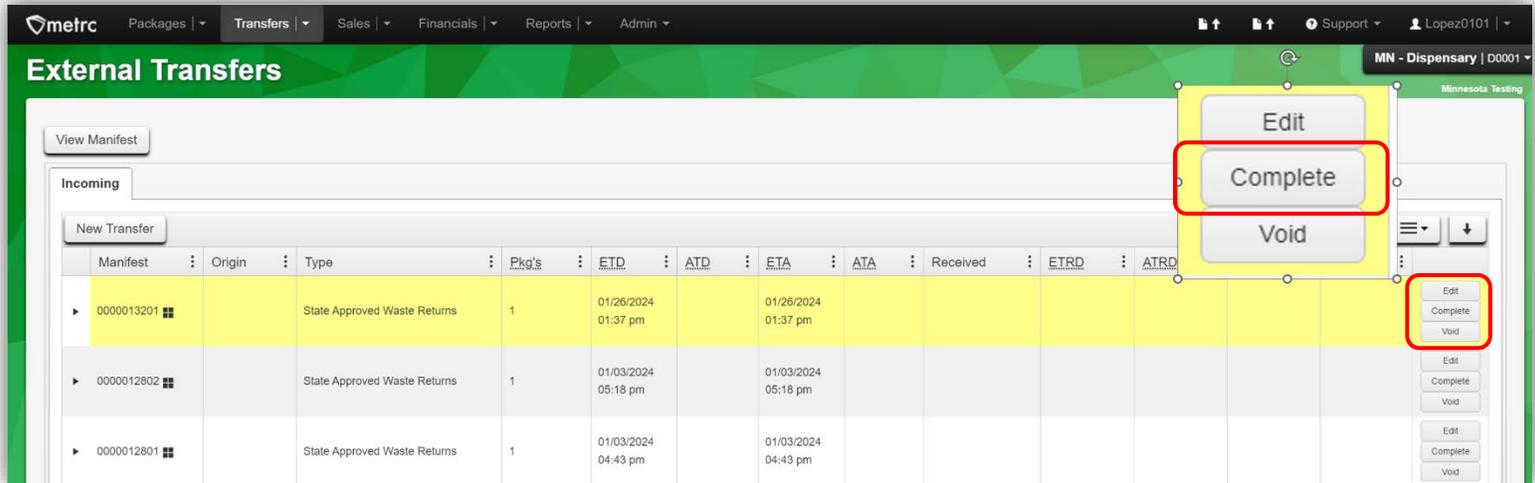
Figure 7: Completing the Transfer

This will allow for the placement of a new Metrc package tag with the item or items and select that tag on the Complete Incoming Transfer screen in the Package #1 field. Then choose the location where the items will be stored. One Metrc tag can be used for all the Pre-Metrc Returns getting tagged in Metrc at that time. Once all required information has been entered, select the green Complete Transfer button to complete the transfer – see **Figure 8**.
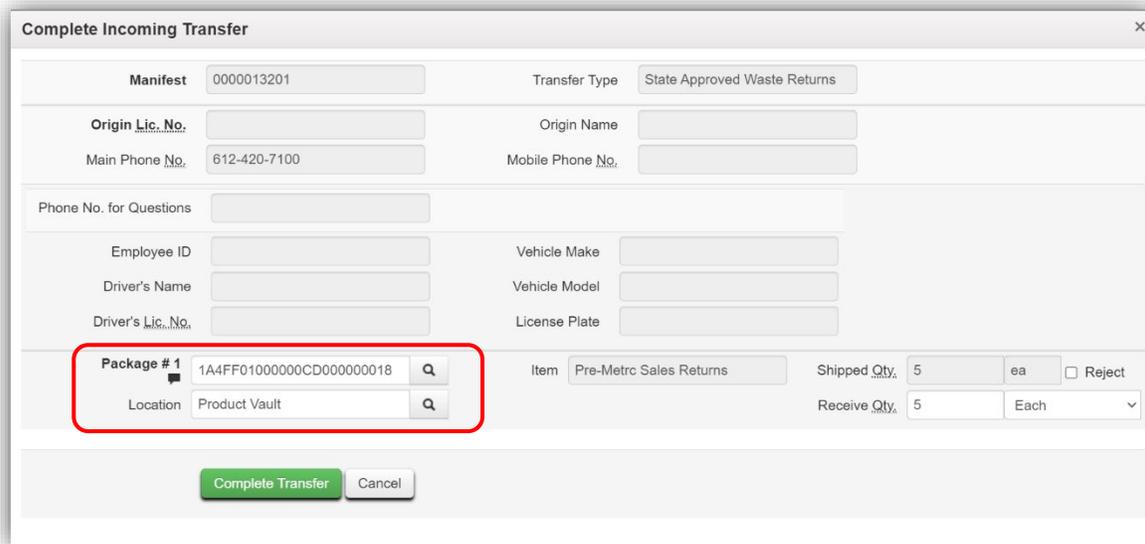
Figure 8: Tagging and Completing the Transfer

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After completing the incoming transfer, the package will appear in the active packages grid and a note will need to be added to the new package.

To add a note to the newly received package tag, go to the Packages area in the navigational toolbar to open the Packages grid. Select the Active tab to see the new package – see **Figure 9.**
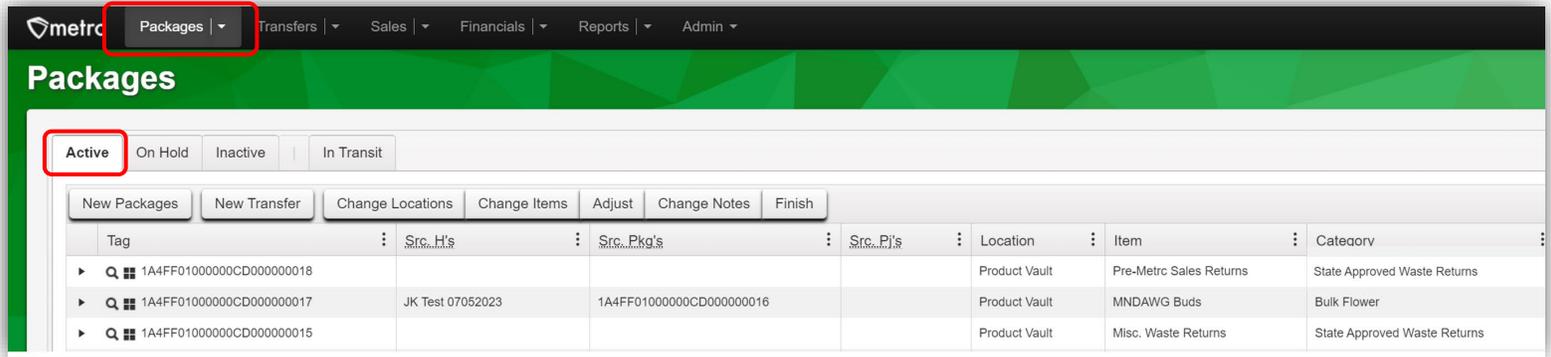
Figure 9: Active Packages grid

Highlight the newly received package by clicking on it, then select the Change Notes button to access the Change Notes action window. This will open the Change Notes action window to enter a note listing what was returned and their approximate quantities. Pressing Enter will submit the note so if multiple packages need to be listed, separate them by commas. Select the green Change Notes button to add the note to the package – see **Figure 10**.
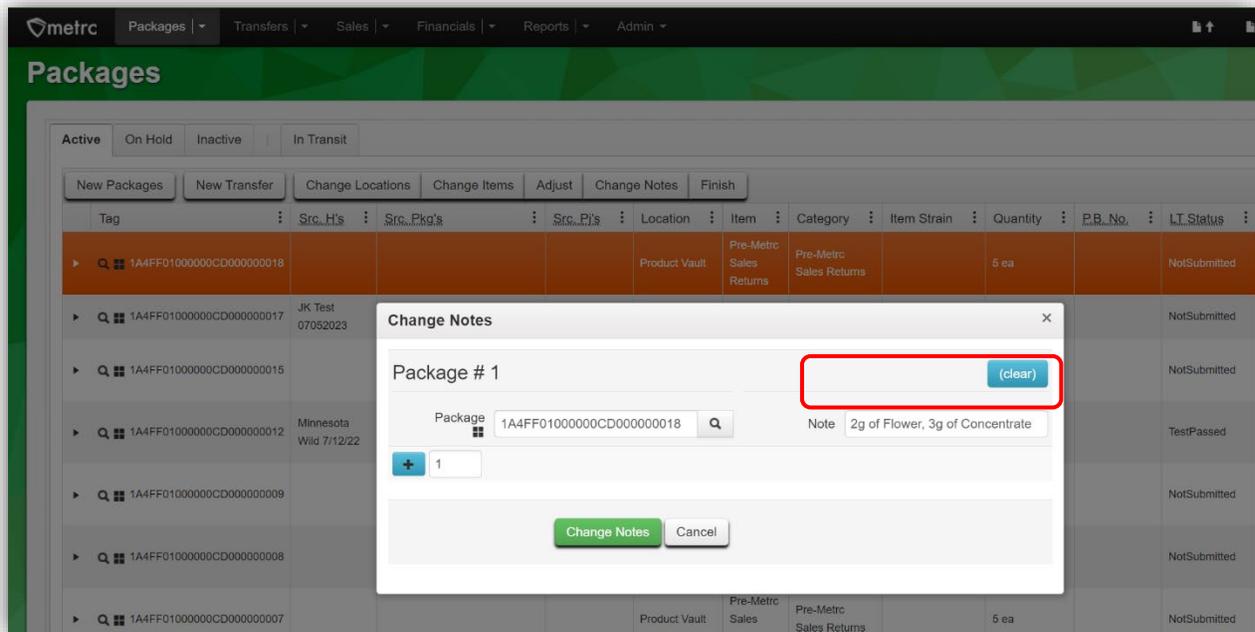
Figure 10: Selecting Newly Received Tag(s) and Changing Notes

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Once the note has been added, email the OMC and let them know the Pre-Metrc Sales Return items have been tagged. The OMC will then remove the dispensary's ability to create incoming external transfers.

Tagging Waste Product Returns

The OMC will turn on external incoming transfers for the dispensaries that need to tag Waste Product Returns for the agreed upon timeframe. During this time, a user with permission at the dispensary will need to create a new incoming external transfer and select State Approved Waste Returns as the type. In the planned route field, input "N/A State Approved Waste Returns".

Once the External Transfers has been enabled by the OMC, take the following steps to complete tagging waste product returns:

Select the External option from the drop-down in the Transfers area on the navigational toolbar. Open the Incoming tab, then select the New Transfer button from the External Transfers grid – see **Figure 11.**
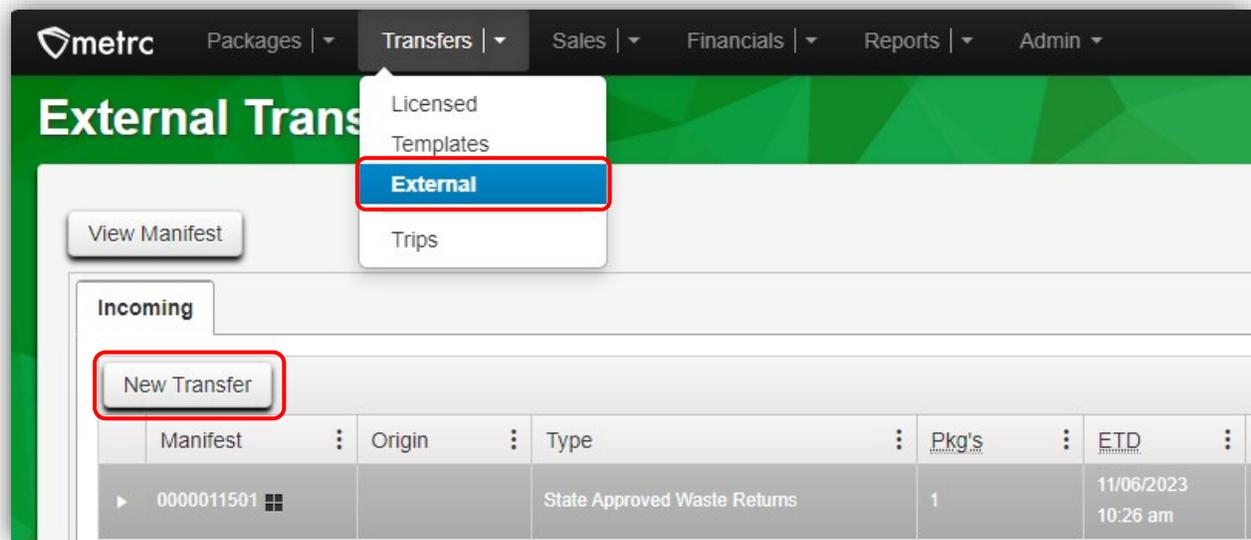
Figure 11: Creating New Incoming Transfer in External Transfers grid

This will open the New Incoming Transfer action window to fill out the required fields for the External Transfer.

- Select State Approved Waste Returns option as the type from the drop-down menu.
- In the planned route field put "N/A State Approved Waste Returns."
- Select the Waste Product Return item for Package #1.

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- In the quantity field, put the total number of items being tagged.

Once all required fields have been entered, select the green Register Transfer button to register the External Transfer – see **Figure 12.**

Figure 12: Registering the Transfer

Once the External Transfer has been registered, it will appear in the Incoming Externals Transfers grid and needs to be completed. To do this, select the Complete button on the right side of the External Transfer needing to be completed in the grid – see **Figure 13**.

Figure 13: Completing the Transfer

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This will open the Complete Incoming Transfer action window to now place a new Metrc package tag with the item or items and select that tag on the Complete Incoming Transfer screen in the Package #1 field. Then choose the location where the items will be stored. One Metrc tag can be used for all the Pre-Metrc Returns getting tagged in Metrc at that time. Once all required information has been entered, select the green Complete Transfer button to complete the transfer – see **Figure 14**.

Figure 14: Tagging and Completing the Transfer

After completing the incoming transfer, the package will appear in the active packages grid and a note will need to be added to the new package.

To add a note to the newly received package tag, go to the Packages area in the navigational toolbar to open the Packages grid. Select the Active tab to see the new package – see **Figure 15** below**.**

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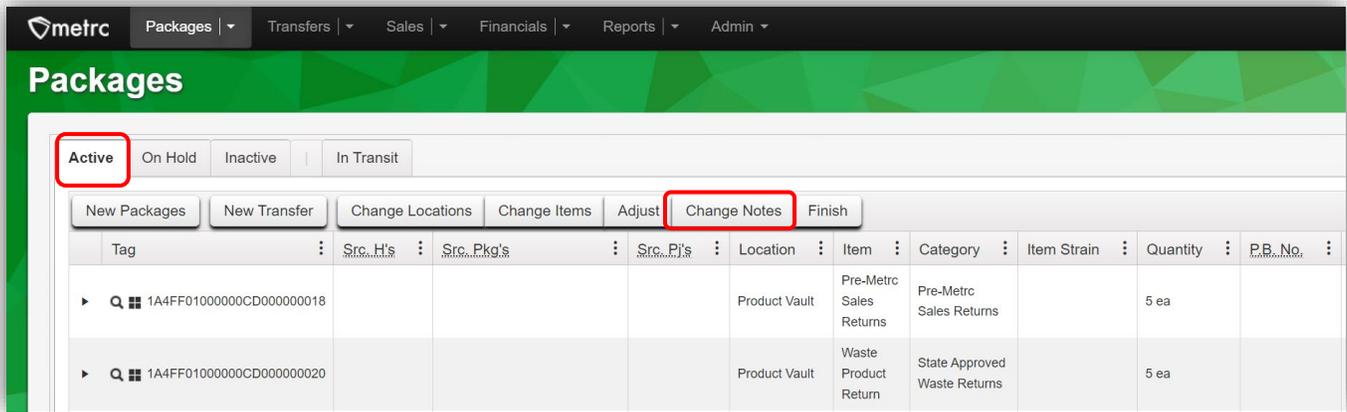
Figure 15: Active Packages Grid

Highlight the newly received package by clicking on it, then select the Change Notes button to access the Change Notes action window. Here, enter a note listing what was returned and their approximate quantities. Pressing Enter will submit the note so if multiple packages need to be listed, separate them by commas. Select the green Change Notes button to add the note to the package – see **Figure 16**.
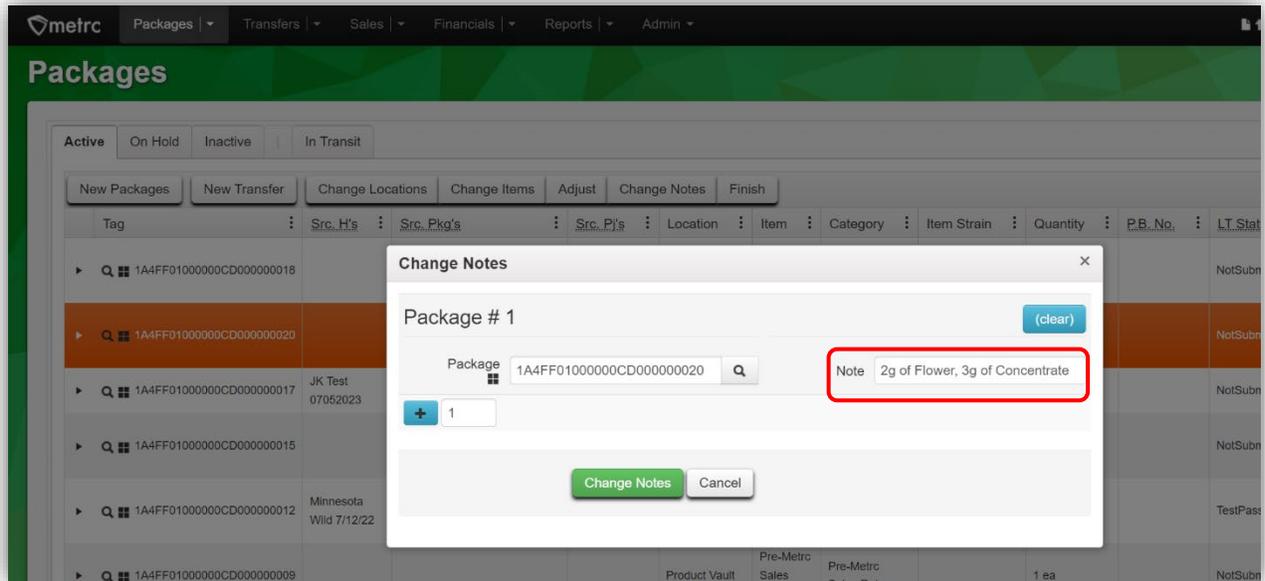
Figure 16: Selecting Newly Received Tag(s) and Changing Notes

Email The OMC and let them know you have finished tagging Pre-Metrc Waste Product Return items. The OMC will then remove the dispensary's ability to create incoming external transfers.

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Metrc Resources

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

Contact Metrc Support: Email Support@metrc.com or call 877-566-6506

Metrc Learn: Metrc Learn is designed to offer educational opportunities to enhance users' skills with the Metrc system and provides various training options. In addition, the learning system is organized into facility-specific programs made up of various courses. To login, visit Metrc Learn and enter your login credentials, or to access, register by visiting the Metrc Learn Registration.

Access additional resources: In the Metrc system, click on the "Support" dropdown in the top-right navigation pane and select the appropriate resource, including educational guides and more.

Thank you for your continued partnership.

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