

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

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.



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."



To create the new Items, start by selecting the Items option in the Admin area dropdown menu on the navigational toolbar – See **Figure 1**.

©me	etrc Packages - Transfers	s		Admin 👻	
lter	ns			Tag Orders Tags	
A	dd Items Edit Items			Locations Strains	
	Item :	Category :	Туре :	Items	efault LTS
•	Butter Kush	Bud/Flower - 0345	Buds	Transporters	otSubmitted
•	Cannabis Waste	Cannabis Waste	Other	Employees	otSubmitted
•	Generic Infused Non-Edible (liquid)	Infused Non-Edible (liquid)	InfusedNonEdible	CountBased	NotSubmitted
•	Generic Medical Edibles	Infused Edible	InfusedEdible	CountBased	NotSubmitted
•	Misc. Waste Returns	State Approved Waste Returns	Other	CountBased	NotSubmitted
	Pre-Metrc Sales Returns	Pre-Metrc Sales Returns	Other	CountBased	NotSubmitted
•	Waste Product Return	State Approved Waste Returns	Other	CountBased	NotSubmitted
H	Page 1 of 1	► ► 20 ▼ rows per	page		

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**.

⊘metrc	Packages -	Transfers	- Sales -	Financials	∣ ▼ Report	s -	Admin 👻	
ltems								
Add Items	Edit Items							
Item		:	Category	:	Туре	:	Quantity Type	:

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**.

		(clea
Name	Pre-Metrc Sales Returns Unit of Measure	- Select -
Category	State Approved Waste Returns	Select files
		Description
	Label Photo	Select files
		Description
	Packaging Photo	Select files
		Description
1 (i	ngredient)	
- 1	(item)	
	multi-Facility create such as that available in Employees, Stra	ins, and Locations?

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

d Items			
em # 1			(clear
Name	Waste Product Return	Unit of Measure	- Select -
Category	State Approved Waste Returns	 ✓ Product Photo 	Select files
			Description
		Label Photo	Select files
			Description
		Packaging Photo	Select files
			Description
1 ()	ngredient)		
. 1	(item)		
hy is there no ertain Item Cat all of the selec create Items in	multi-Facility create such as that ava egories require the selection of a pre-exi ted Facilities would be convoluted and c multiple Facilities at the same time.	ilable in Employees, Strai isting Strain. Verifying and in complex to inform. For this re	ins, and Locations? nforming that the specified Strain exists eason we have opted to not add the ability

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

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



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**.

⊘metrc Pack	ages 🗸 🛛 Transfe	ers - Sales -	F	nancials 🕶 Reports 🕶	Admin 👻		
External 1		sed ates					
View Manifest	Trips						
New Transfer	J						
Manifest	:	Origin	:	Туре	:	Pkg's	:
▶ 0000012802				State Approved Waste Returns		1	

Figure 5: Creating New Incoming Transfer in External Transfers grid



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.**

lew Incomin	g Transfer
Туре	State Approved Waste Returns 🗸
Phone No.	612-420-7100
Planned Route	N/A Pre-Metrc Returns Est. Departure 01/26/2024 today 01 11 PM • • • Est. Arrival 01/26/2024 today
Pacl	kage #1 Pre-Metrc Sales Returns Q (clear) Package Date 101/26/2024 10 today
01	Quantity 5 Each (package) Register Transfer Cancel

Figure 6: Registering the Transfer



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**.

7	≷me	trc Packag	jes ·	• 1	Transfers		▼ Reports	+ Admin +							6+ 6	it (Support	Lopez0101	.
E	xt	ernal T	rai	nsf	ers		$< \neg$									Q		MN - Dispensary D	0001 -
	Vie	w Manifest												•		Edit		Minnesota Te	esting
	Ine	coming												P	Co	mple	ete	0	
		New Transfer														Void		≡∙↓	
		Manifest	:	Origi	in :	Туре	Pkg's	ETD :	ATD :	ETA :	ATA :	Received	ETRD	: ATRD		0		:	
	,	0000013201				State Approved Waste Returns	1	01/26/2024 01:37 pm		01/26/2024 01:37 pm				Ŭ		Ŭ		Edit Complete Void	
		0000012802				State Approved Waste Returns	1	01/03/2024 05:18 pm		01/03/2024 05:18 pm								Edit Complete Void	
	,	▶ 0000012801				State Approved Waste Returns	1	01/03/2024 04:43 pm		01/03/2024 04:43 pm								Edit Complete Void	

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**.

Manifest	0000013201		Transfer Type	State Approved Was	te Returns			
Origin Lic. No.			Origin Name					
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	1A4FF01000000CD00000018	٩	Item Pre-Metro	c Sales Returns	Shipped <u>Qty.</u>	5	ea	Reject
Location	Product Vault	Q			Receive Oty	5	Each	

Figure 8: 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 9**.

⊘metro	Packages • Transfers • Sales • Financials • Reports • Admin •												
Pack	ackages												
Activ	Active On Hold Inactive I In Transit												
Ne	w Packages New Tr	cansfer Change	Locations	Change Items	Adjust	Change Notes	Finish						
	Тад	:	Src. H's	:	Src. Pk	(g's	:	Src. Pj's	Location :	Item :	Category		
•	Q # 1A4FF0100000CD00	0000018							Product Vault	Pre-Metrc Sales Returns	State Approved Waste Returns		
•	Q # 1A4FF0100000CD00	00000017	JK Test 070	52023	1A4FF0	1000000CD0000001	16		Product Vault	MNDAWG Buds	Bulk Flower		
•	Q 👪 1A4FF0100000CD00	00000015							Product Vault	Misc. Waste Returns	State Approved Waste Returns		

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**.

Smetrc Packages - Transfers	← Sales	 Financials • Re 	ports 🛛 👻 🛛 Ad	min 👻						kt k
Packages										
Active On Hold Inactive	In Transit									
New Packages New Transfer	Change Loc	ations Change Items A	djust Chang	e Notes Fini	sh					
Tag	Src. H's	Src. Pkg's	Src. Pi's	Location :	Item :	Category :	Item Strain	Quantity :	P.B. No.	LT Status
► Q # 1A4FF01000000CD000000018										
► Q # 1A4FF01000000CD000000017	JK Test 07052023	Change Notes						×		NotSubmitted
► Q # 1A4FF01000000CD000000015		Package # 1						(clear)		NotSubmitted
► Q # 1A4FF01000000CD00000012	Minnesota Wild 7/12/22	Package	01000000CD00	0000018 Q		Note 2g of	Flower, 3g of Cor	ncentrate		TestPassed
► Q # 1A4FF01000000CD00000000		+ 1	_					_		NotSubmitted
► Q III 1A4FF01000000CD000000000			Change No	tes Cancel						NotSubmitted
► Q # 1A4FF0100000CD00000007				Product Vault	Pre-Metro Sales	Pre-Metrc Sales Returns		5 ea		NotSubmitted

Figure 10: Selecting Newly Received Tag(s) and Changing Notes



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**.

⊘metrc Packages -	Transfers -	Sales	ports 🗸 🛛 Admin	*
External Trans	Licensed Templates			
	External			
View Manifest	Trips			
Incoming				
New Transfer				
Manifest :	Origin :	Туре	E Pkg's E	ETD :
▶ 0000011501 🚻		State Approved Waste Returns		11/06/2023 10:26 am

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.



• 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**.

туре	State A	Approved Was	te Returns	~						
Phone No.	612-42	0-7100								
Planned Route	N/A Sta	te Approved \	Vaste Returns			<u>Est.</u> Departure	1 01/26	/2024		toda
							^	^		
							03	: 03	PM	
							*	*		
						Est. Arrival	m 01/26	/2024		toda
							^	^		
							03	: 03	PM	
				li			*	*		
Pack	age # 1	Waste Prod	uct Return	٩	(clear)	Package Date	1 01/26	/2024		toda
(Quantity	5	Each	~						
• 1	(pa	ackage)								
		-								

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**.

cte	rnal Transfer	s										N - Dispensary D
	inter transform											Minnesota 1
View	Manifest										Edit	
Inco	oming										Complete	
N	ew Transfer Manifest : Origin	: Туре	: Pkg's	ETD I	ATD :	ETA :	ATA	Received	ETRD	i ATRD i	Void	
•	0000013202	State Approved Waste Returns	1	01/26/2024 03:03 pm		01/26/2024 03:03 pm						Edit Complete Vold
	0000013201	State Approved Waste Returns	4	01/26/2024 01:37 pm		01/26/2024 01:37 pm		01/26/2024 02:22 pm				
. P												6 mm

Figure 13: Completing the Transfer



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**.

Manifest	0000013202	Transfer Type	State Approved W	/aste Returns			
Origin Lic. No.		Origin Name					
Main Phone <u>No</u> ,	612-420-7100	Mobile Phone No.					
Phone No. for Questions	s						
Employee ID	>	Vehicle Make					
Driver's Name	э	Vehicle Model					
Driver's <u>Lic. No</u>	k	License Plate					
Package # 1	1A4FF0100000CD00000020	Q Item Waste	Product Return	Shipped <u>Qty.</u>	5	ea	🗌 Reject
	Deside and March	0		Peceive Otv	5	Each	

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.

Smetrc Packages - Transfers		· Financials - F	Reports 🗕 🗛	dmin 👻					
Packages									
Active On Hold Inactive	n Transit		_						
New Packages New Transfer	Change Loc	ations Change Items	Adjust Chang	ge Notes Fin	ish				
Tag :	Src. H's	Src. Pkg's	Src. Pj's	Location :	Item :	Category :	Item Strain	Quantity :	P.B. No.
► Q # 1A4FF0100000CD00000018				Product Vault	Pre-Metrc Sales Returns	Pre-Metrc Sales Returns		5 ea	
► Q # 1A4FF01000000CD00000020				Product Vault	Waste Product	State Approved Waste Returns		5 ea	

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**.

Smetrc Packages - Transfers	I ▼ Sales I ▼ Financials I ▼ Reports I ▼ Admin ▼	h
Packages		
Active On Hold Inactive	In Transit	
New Packages New Transfer	Change Locations Change Items Adjust Change Notes Finish	
Tag	Src. H's I Src. Pi's I Location Item Category Item Strain Quantity	: P.B. No. : LT Sta
• Q # 1A4FF01000000CD000000018	Change Notes ×	NotSub
► Q # 1A4FF01000000CD00000020	Package # 1 (clear)	NotSub
► Q ■ 1A4FF0100000CD00000017	JK Test Package 1A4FF01000000CD000000020 Q Note 2g of Flower, 3g of Concentrate 07052023 + 1 1 1 1 1	NotSub
► Q # 1A4FF01000000CD000000015		NotSub
► Q # 1A4FF0100000CD00000012	Change Notes Cancel Wild 7/12/2	TestPar
• Q # 1A4FF01000000CD00000000	Pre-Metro Pre-Metro 1 ea	NotSub

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.



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 <u>Metrc Learn</u> and enter your login credentials, or to access, register by visiting the <u>Metrc Learn Registration</u>.

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.