

Bulletin Number: ME_IB_0050	Distribution Date: 10/31/2024	Effective Date: 11/06/2024
Contact Point: Metrc Support		
<b>Topic:</b> Provide instruction on ho events in Metrc.	w cannabis stores record off-p	remises sales at specified

#### Greetings,

Metrc and the Office of Cannabis Policy (OCP) are providing the following guidance regarding the inventory tracking requirements applicable to the new authorized activity for cannabis stores off-premises sales of cannabis and cannabis products at specified events.

Cannabis store licensees are reminded that a specified event permit is required for each specified event where the licensee intends to make off-premises sales to consumers. Under no circumstances may a cannabis store licensee make, or record in Metrc, off-premises sales at a specified event without first obtaining from OCP a permit to conduct sales at the specified event. Licensees should reach out to OCP for additional information regarding the permitting process and requirements applicable to off-premises sales at a specified event.

Please read on for additional information on the Metrc data entry process. Licensees may also visit Metrc Learn to watch a training video on how to perform Specified Event specific functions in Metrc.



# **Specified Event Locations**

Specified event locations need to be designated within the Cannabis Store's account. To prepare for a specified event, begin by accessing the Admin area on the navigational toolbar and choose the Locations option from the drop-down – **see Figure 1.** 



Figure 1: Locations option in Admin area dropdown

From the Locations grid, select the Add Locations button to add or create a new location – **see Figure 2**.



Figure 2: New Location Creation



This will open the Add Locations action window to add a new location. Use the Name field to record the specified event permit number listed on the specified event permit issued by the OCP. Then select the "Specified Event" from the Location Type dropdown. Once all required fields are completed, click the "Create Locations" button – **see Figure 3**:

ocation #		(clear)
Name	1501-0001	
Location Type	Specified Event 🗸	
+ 1		

Figure 3: Add Locations action window

The newly created Location will now be available for use.



# **Specified Event Transfers**

Licensees approved for specified events by the OCP are required to record products being transferred to the event through a licensed transfer using the transfer type of "Specified Event."

To create a transfer, navigate to the Transfers area on the navigational toolbar and select the "Licensed" option from the Transfers dropdown – **see Figure 4**.



Figure 4: Transfer drop down

This will open the Licensed Transfers grid. Then, select the New Transfer button to open the New Licensed Transfer action window – **see Figure 5.** 

©metrc □	Plants   <del>+</del> F	Packages   🕶	Transfers   <del>-</del>
License	d Tran	sfers	
New Transfe	View Manif	est	
Incoming (2/	2) Inactive	Outgoir	ng Rejected

Figure 5: New Licensed Transfers

From the New Licensed Transfer action window, fill out the required fields. In the Destination 1 field use the store license number, as it appears in Metrc. The license number can be populated by either typing in the license number and selecting the correct license number when it shows in the list or using the magnifying glass and selecting the license number from the list.

The Type of transfer should be "Specified Event" that is chosen from the dropdown. The Planned Route field should be populated with the location the product is originating from and the location the specified event is located in (i.e. Portland, ME to Orono, ME). In the Transport #1 field, use the <u>same</u> store number that is populated in the Destination 1 field.



The Est. Departure and Est. Arrival times can be updated to the appropriate dates and times that accurately reflect the time of the transfer. Add the Driver and Vehicle information for the appropriate driver and vehicle that will be used for the transfer. Then add the package(s) to the transfer that are being sent to the Specified Event. Once all information has been entered and verified to be accurate, select the Register Transfer button – **see Figure 6**.

estination 1	ME-000	02 <b>Q</b>	(clear)	Туре	Specified E	Event		~	1
anned Route	Portland	I, ME to Orono, ME		Invoice Number	Enter the l	nvoice Nu	Imber		
				Est. Departure	10/28	/ 2024		today	
					^	^			
					11 :	00	AM		
				Est Asimt	* 10./20	•	-	to day.	
				Est. Arrival	10/20	A	0	today	
			lli.		01 :	30	PM		
					*	*			
Tran	sport # 1	ME-00002	Q (ciea	0					
E	hone No.	1234567890	(use default)	•	Layover	r			
	Driver 1	Joe Brown	Q (clear)	Vehicle 1	LVWeed			Q	
Drive	er's Name	Joe Brown		Vehicle Make	Chevy				
Em	ployee ID	X10009		Vehicle Model	Kush Var	1			
Dr	iver's Lic. No.	A140056789090		License Plate	LVWeed				
0	1 0 (0	details)							
• 1	C (tra	nsporter)							
Pack	age # 1	Type part of Package number	Q, (clear)	l					
Quic	k Entry	Quick entry packages	OFF						
0 1	C (pa	ckage)		CSV or TXT file up to	o 1 Mb with or	ne package	label value	per line is requ	wired
					Select files	s			
1 10 4	(antion)								
1 100 10	esunduon)								
submitting multip	le package	values like Gross Weight, Unit Of Meas	ure, or Wholesale	Price please include a	header row				
Label, Gross V es not show the	Veight, UOM ese fields th	, and Wholesale Price in a csv file with e upload will not populate the values or	each record on a the page.	new line. If the Transfe	er Type chose	en			

#### Figure 6: Licensed Transfer action window



**Note**: Transfers are recorded for entire packages. If only a portion of the package is being transferred or if some of the package has already been sold, a new child package must be created from the original product.

If a Transfer that has been created needs to be edited or voided, that would be done in the Licensed Transfers grid in the Outgoing transfers tab – **see Figure 7.** 

ce	nsed Transfe	r	5			Ż					-	Maine Testi
New	Transfer View Manifest											
Inco	oming (10/10) Inactive	(	Dutgoing (7/7) Rejected Inactive									
										ā. Y.	)[≡·	
	Manifest	:	Destination	:	Stops	:	Ekg's :	Employee	;	Date Created	:	
•	0000035701 🔛		ME-00002 (ME Store)		1.		1	Cynthia Cole		02/29/2024 03:45 pm		Edit Void
	0000034801		ME-00002 (ME Store)		1		3	Cynthia Cole		01/29/2024 11:30 pm		Edit

Figure 7: Outgoing Transfer – Edit or Void action buttons

Upon arriving at the specified event, the incoming transfer needs to be received. To receive the transfer, go to the Transfers area on the navigational toolbar and select the Licensed option from the dropdown. Click on the Incoming tab and this will display all of the incoming transfers. Locate the Specified Event transfer needing to be received and select the Receive button on the right-hand side of the Licensed Transfer grid that correlates with the product that has physically arrived at the specified event – **see Figure 8**.



Figure 8: Receiving Incoming Licensed Transfers



Packages being received at a specified event must be assigned to the corresponding Specified Event location. To assign a location to the packages, use the magnifying glass icon to the right of the location field to designate the correct location. If using the Template, select the green check mark to auto populate the same location to all of the packages being received. When complete, click the Receive Transfer button – **see Figure 9.** 

Manifest	0000042201	Transfer	r Type	Specified Event				
Origin Lic. No.	ME-00002	Origin	Name	ME Store				
Main Phone <u>No.</u>		Mobile Phon	ie <u>No.</u>					
Transporter Lic. No.	ME-00002	Transporter Nar	me N	/IE Store				
Phone No. for Questions	1234567890							
Employee ID	X10009	Vehicle Ma	ke C	Chevy				
Driver's Name	Joe Brown	Vehicle Mo	del K	íush Van				
Driver's <u>Lic. No.</u>	A140056789090	License Pla	ate L	VWeed				
Package # 1	1A4FF03000006800000096 Q	ltem E	Blue Drea	am Prepack 3.5 g	Shipped Qty.	93	g	Reject
Location [	Event Vault Q				Receive Qty.	93	0 Grams	
	Receive Transfer Cancel							

Figure 9: Receive Licensed Transfer action window

The newly received packages will now be visible on the Active Packages screen and those packages will show the Specified Event location that was previously assigned for the event when they were received – **see Figure 10**.

Active On H	Hold Inactive	In Transit	Fransferred	1		( )							
New Packag	es New Tran	sfer Change Loc	ations Change Items	Adjust	Change N	otes Finish							
Tag		Src. H's	: Src. Pkg's	: Sr	c Pis 🚦	Location :	ltem :	Category	Item Strain	Quantity	P.B. No.	LT Status	: <u>A.H.</u>
▶ Q 1 1A41													

#### Figure 10: Active Packages assigned to locations

**Note:** To expand visible columns, such as to view location types, use the three dots located on the right side of any column header. This shortcut can be used across various grids in Metrc.



## Specified Event Sales Receipts

Once the package(s) have been fully received, specified event sales need to be recorded. To record specified event sales, go to the Sales area on the navigational toolbar and select the Sales Receipts option from the dropdown – **see Figure 11**.



Figure 11: Sales Receipts in the Sales area

From the Sales Receipts grid, select the Active tab and click the 'Record Receipts' button to open the Record Receipts action window – **See Figure 12.** 

Sales Receipts	Proord Receipts	×
Import Sales         Daily Sales (read-only)           Active         Inactive           Receipt         Eddt Receipts           Receipt         5           9         900000545           9         900000545           9         9018/0224 62 52 pr           R         Page 1	Sales Receipt # 1 (dea Sales Receipt # 1 (dea Date/Time Package # 1 (b/29/2024 to today 11 : 45 AM Package # 1 (b/29/2024 to today Package # 1 (b/29/2024 to today Total Price \$ ex 100.22(b) • Transaction Details	
	(rackage)      (ackage)      (ackage)	

Figure 12: Record Sales Receipts action window

In the Record Receipts action window, enter all required information ensuring you select the specified event package in the Package field to record the specified event sale.

**Note:** To confirm information is accurate, utilize the Location filter from within the Record Receipts #1 action window to confirm.

Once all required information has been entered, click the Record Sales Receipts button to complete the recording of the Sales Receipt. – **see Figure 13 below.** 

es nece	ipt # 1								(clear)
Sale	10/29/2024	🗂 today							
Date/Time	^ ^								
	02 : 02	PM							
	Package # 1	1A4FF0300000680	00000096 <b>Q</b> (0000)	Quantity	7 0	Grams	~	Max	
	Available	93 g		Total Price	\$ 50.00	0			
. To	ansaction Details	1							
		-							
<b>(</b> ) () ()	ckage)								
1 0									
	-								

©metrc.

Figure 13: Record Receipts action window

# **Specified Event Return Transfer**

When the specified event has concluded, a new licensed transfer must be created to record the transfer of any unsold product(s) back to the Store license.

To record the transfer of product back to the Store license, all remaining packages must be included in a new Specified Event transfer to record the final transfer taking place. To record the transfer of product, go to the Transfers area on the navigational toolbar and select the 'Licensed' option from the drop-down – **see Figure 14.** 



Figure 14: Select Transfers

From the Licensed Transfers grid, select the New Transfer button – **see Figure 15 below**.



censed Transfers					ME Store   ME-00002
					Maine Testing
Sector And March 1					
New Transfer View Manifest					
Incoming (10/10) Inactive   Outgoing (7/7) Rejected	Inactive				
		Please select a tab to view its co	ontent.		

Figure 15: Select New Transfer

This will open the New Licensed Transfer action window to fill out the required fields. In the Destination 1 field use the store license number, as it appears in Metrc. The license number can be populated by either typing in the license number and selecting the correct license number when it shows in the list or using the magnifying glass and selecting the license number from the list.

The Type of transfer should be "Specified Event" that is chosen from the dropdown. The Planned Route field should be populated with the route on how to go from the specified event back to the store. In the Transport #1 field, use the <u>same</u> store number that is populated in the Destination 1 field.

The Est. Departure and Est. Arrival times can be updated to the appropriate dates and times that accurately reflect the time of the transfer. Add the Driver and Vehicle information for the appropriate driver and vehicle that will be used for the transfer. Then add the package(s) to the transfer that are being returned from the Specified Event. Once all information has been entered and verified to be accurate, select the Register Transfer button – **see Figure 16 below.** 

<b>⊘metrc</b>
---------------

stination 1	ME-0000	Q Q	(clear)	Туре	Specified Event	~
nned Route	Orono, N	/IE to Portland, ME		Invoice Number	Enter the Invoice Number	
				Est. Departure	10/29/2024	today
					<u>^</u>	
					05 : 00 PM	l .
				(	<b>v v</b>	
				Est. Arrival	10/29/2024	today
			11.		06 : 30 PM	
					× ×	
Tran	sport # 1	ME-00002	Q	(clear)		
P	hone No.	1234567890	(use de	efault)	Lavover	
	Driver 1		0	(clear) Vobiclo 1	LVW/ood	0
Drive	de Neme		4	Vehicle Make	Chave	4
Drive	rs warne			venicie iviake	Chevy	
Emj	ployee ID	X10009		Vehicle Model	Kush Van	
Dr	iver's <u>Lic.</u> No.	A140056789090		License Plate	LVWeed	
	A (4					
<b>.</b>	0	etans)				
•	0 (trai	nsporter)				
Packa	age # 1	1A4FF03000006800000096	Q (	(clear)		
Quic	k Entry	Quick entry packages	OFF			
	C (na	nkane)		CSV or TXT file up to	o 1 Mb with one package label valu	e per line is r
	0				Select files	
1 0 (d	estination)					
ubmitting multip Label. Gross V	le package v /eight, UOM,	values like Gross Weight, Unit Of Meas and Wholesale Price in a csv file with	ure, or Who each recor	lesale Price please include a d on a new line. If the Transf	header row er Type chosen	
es not show the	ese fields th	e upload will not populate the values or	n the page.			



**Note:** To verify all specified event packages are recorded, select the magnifying glass to the right of the package field and filter for the Specified Event location using the three stacked dots located on the right side of the location column header. More packages can be added to the transfer by selecting the plus sign icon in the lower left corner under package #1. – **see Figure 17 below.** 

# Smetrc.

	Edit Licensed	Transfe											×	
	Manifest	0000042												
	Destination 1	ME-0000	2	٩				Type	Specified I	Event		~		
Rejected Inactive	Planned Route	Orono, N	IE to Portland, N	ΛE			Invoice Nu	mber						
							Est. Depa	irture	10/2	9/2024		oday		
Destination									05	00 PM				1
ME-00002 (ME Store)									*	*				
							Est, A	urival	10/2	/ 2024		oday		
ME-00002 (ME Story)						li.			06	30 PN				
ME-0002 (ME Store)									*	*				
	Trans	sport # 1	ME-00002			Q. (clear)	1							
ME-20002 (ME Store)	e	hone No.	1234567890			(use defaut)			Layove	t.				
ME-00002 (ME Store)		Driver 1				Q (clear)	Vet	nicle 1				Q		
MF-20022 AMF Stores	Drive	r's Name	Joe Brown				Vehicle	Make	Chevy					
	Emp	oloyee ID	X10009				Vehicle	Model	Kush Va	n				
ME-00005 (ME Manufacturer)	Dri	ver's Lic.	A14005678909	0			License	Plate	LVWeed					
20 • rows per page	0	0 0	stalls)											
		In Cra	scourteri											
	Packa	ige # 1	Ivoe part of Paci	kage number		0								
	Quic	Fotry			-									
Colore			Juick entry baci	(3085	-	OFF		-			-			
Select														
Tag :	Src. H's	Src. Pkg	s i	Location	:	Item	1	Categ	gory :	Item Strain	: Q	uantity	1	LT Status
Q # 1A4FF03000006800000096	Blue Dream 12.7.20	1A4FF030	00000100000254	Event Vault		Blue Dream P	repack 3.5 g	Buds/F	lower	Blue Dream	86	g		TestPassed
Page 1		10 •	rows per page											
Select Cancel														

Figure 17: New Licensed Transfer Packages action window

Once the final Specified Event transfer has been registered, navigate to the Transfers area on the navigational toolbar and select the Licensed option from the dropdown. Click the Incoming tab in the Licensed Transfers grid and select the Receive button to the right of the corresponding Specified Event transfer being received into the store license – **see Figure 18 below**.



							_	
								Receive
anced Trans								
enseu mans	sters							
enseu frans	sters							
emSeu mans	sters							
ew Transfer View Manife	sters							
ew Transfer View Manife	STERS	ejected Inactive						
ew Transfer View Manife ncoming (11/11) Inactive	STERS	ejected Inactive						
emsed frans ew Transfer View Manife ncoming (11/11) Inactive	sters	ejected Inactive						
emsed frans ew Transfer View Manife ncoming (11/11) Inactive Manifest	STEPS	ejected Inactive	: Phys	: EID	E ATD	: EIA	: AIA	. Received
ensee mans ew Transfer View Manife ncoming (19/1) Inactive Manifest	STEPS	ejected Inactive	: Pkg's	ETD excence4	E ATD	: <u>EIA</u> 02292024	: AIA	: Received
ensee Transer ew Transfer View Manife ncoming (11/11) Inactive Manifest > 0000036701 82	sters st i Oulgoing (86) R i Origin victores victores	ejected Inactive : Type Specified Event	: Plaga 1	ETD 2029/0224 03.45 pm	: ATD	ETA 02/29/2024 03:45 pm	i ata	i Received
ensee manser ew Transfer View Manife ncoming (11/11) Inactive Manifest > 0000026701	sters st  t	ejected Inactive	E Pkg's	E ETD C2/C4V2024 C3/45 pm 01/29/2024	E ATD	ETA 02/29/2024 03/40 pm 01/20/2024	: AIA	E Received

#### Figure 18: Receiving Incoming Specified Event Transfers

From the Receive Licensed Transfer action window, verify the location is correct and then click the Receive Transfer button. Package(s) being received as returned products to the license's store facility will no longer be associated with a Specified Event location. They should be recorded with the correct location electronically where the package(s) will be physically located at the Store location – **see Figure 19 below**.

Manifest 00000 Origin <u>Lic. No.</u> ME-00	042202	Transfer Type	Specified Event				
Origin Lic. No. ME-00							
	0002	Origin Name	ME Store				
Main Phone No.		Mobile Phone No.	,				
Transporter Lic. No. ME-0	00002	Transporter Name	ME Store				
Phone No. for Questions 12345	567890						
Employee ID X1000	09	Vehicle Make	Chevy				
Driver's Name Joe B	Brown	Vehicle Model	Kush Van				
Driver's Lic. No. A140	0056789090	License Plate	LVWeed				
Package # 1 1A4FF03	3000006800000096 <b>Q</b>	. Item Blue D	ream Prepack 3.5 g	Shipped Qty	86	g	Reject
Location Product	Vault Q			Receive Qty	86 0	Grams	~

Figure 19: Receive Licensed Transfer action window



# Metrc Learn – Specified Events training

To access additional training on Specified Events, please login to Metrc Learn and navigate to the "Maine Specified Events" module – **see Figure 20.** 





Figure 20: Maine Specified Events training in Metrc Learn



## Metrc resources

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

**Contact Metrc Support** by using the new full-service system – Service Cloud – by navigating to <u>Support.Metrc.com</u>, or from the Metrc System, click the Support area and navigate to support.metrc.com and it will redirect to the portal.

*Please note*: If accessing the portal for the first time, a username (which is established when logging in), the respective state and "Facility license number", and a valid email to set a password are required.

**Metrc Learn:** Right now, Metrc Learn offers various programs for users featuring different 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>.

However, we've conducted a lot of listening and learning across the industry, and we're proud to share that Metrc Learn is undergoing a redesign, featuring interactive modules and on-demand advanced training. Stay tuned for more exciting details rolling out soon, as we redefine your experience with Metrc!

Access additional resources: In the Metrc system, click on the Support area on the navigational toolbar and select the appropriate resource, including educational guides, manual, and more from the dropdown.

Thank you for your continued partnership.