

This document is intended to guide you through the process of tagging and reporting your beginning inventory in Metrc. This reference guide is designed as a step-by-step tool, and the information may be used in conjunction with the license specific business processes. The external transfer steps herein are only to be used for bringing in the beginning inventory and are not the same steps that will be taken to track the active inventory in the Metrc system once the beginning inventory has been added.

There are two types of tagged inventory in Metrc: *Plants* and *Packages*. All plants must enter the system as immature plant batches. Seeds will be brought in via Packages. *Packages* are created from seeds, harvest batch packages, or other packages.

#### All Facility Types - Ordering Tags

After being credentialed into Metrc, the first thing that should be done by each facility is to order plant and package tags. Both Plant and Package tags are available to cultivation licenses only. All other facility types will only have the option to order package tags. Tags are printed and shipped via UPS with a standard arrival time of 5-7 days. Please keep this in mind as it is required to have a sufficient stock of tags on hand as they are needed to enter your beginning inventory as well as any ongoing inventory activity.

To order tags, log into your Metrc account, go to the Admin area on the navigational toolbar and select the Tag Orders option from the drop down.



Once in the Tag Orders grid, click on the "New Tag Order" button - see Figure 1.

Figure 1: Ordering Tags

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This will open the New Tag Order action window to create a tag order - **see Figure 2**. Enter the amount of Plant tags and/or Package tags that are being requested for the order. Then select or verify the address that the tag order will be shipped to.

New Tag Order										×
Order Details										
Facility License	MN Test – G 403-X0001	rower 1	Medical plant		500	¢ ×	(\$0.4500 ea.   5,00	0 max. )	\$225.0000	
Physical Address	123 Main Stre Minneapolis	et MN 55401	Medical package		500	0 ×	(\$0.2500 ea.   5,00	0 max. )	\$125.0000	
	inininoupono, i		Include Straps With	Plant Tags						
			Subtotal						\$350.00	
Shipping Details										
Shipping Addres	18						Calculate Tota	al 🗸		
John Doe 123 Main Street Minneapolis, MN 5	5401					Shipping/H \$54.12 Taxes	landling			
Change address						\$0.00 Total Amo \$404.12	unt			
Payment methods										
O Credit card	VISA -	Chicago								
O Check or Money	Order	_								
Please note:										
You MUST place separa and are placed within yo	ite Tag Orders for our Metrc account	each Facility. Plant automatically once	and Package Tags are progr received.	rammed for ea	ach of your i	Facilities indiv	idually			
Make sure that you are i	in the correct Fac	ility within Metrc whe	en you place the order.							
Tag Orders are not tran	nsferable betwee	n Facilities.								
All Tag Orders are fina	l, so we recomm	end that you place	your orders carefully.							
	Place Or	rder								

Figure 2: New Tag Order Action Window

Once all information for the tag order has been entered and verified as accurate, click the "Place Order" button to place the Tag Order.

**Metrc tags are one-time use ONLY**. If an error is made when assigning a plant tag to a plant when moving plants into the vegetative phase, that plant's tag must be replaced using the "Replace Tag" option in the software. If an error is made when assigning a tag to a package, the package in question needs to be discontinued. Once discontinued, that count, or weight will return to the source package or harvest that the product was



originally pulled from. Then a new package can be created with a new package tag associated to it.

### Before the tags arrive (See Admin Setup below), Items, Locations and Strains must be set up as well as adding all Employees into the facility's Metrc account.

Once the tags arrive physically, navigate back into the Tag Orders grid (Tag Orders option under the Admin area on the navigational toolbar) for the specific facility license number, then select the "Receive" button to the far right to populate the tags in the system - **see Figure 3**. DO NOT receive your tags digitally before they physically arrive as receiving them acknowledges that the tags are in the cannabis business license's physical possession.

Tag Orders						Acme Cultivator   AMCCOO Alabama T
Current History						
New Tag Order						
Order Number	Order Date	Status	Total	Paid	Tracking Number	User :
► Demo-All-2023-046-1001	02/15/2023 12:41 pm	Shipped	\$37.23	\$37.23	1Z01A40-Demo-Ail-2023-046-1001	Brittany Peters Receive
H I Page 1 of 1 H	20 v rows per page					Viewing 1 - 1 (1 total) Ö

Figure 3: Receiving a Tag Order

Once the receive button is selected, this will prompt a confirmation window to open to confirm the receipt of the tag order that was physically received - **see Figure 4**.



Figure 4: Confirming Receipt of a Tag Order

Each tag order will arrive and display your facility license number, name, and the unique identification number for that tag.

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All Facility Types - Admin Setup

After a tag order has been placed, licensee Admins based on their license type will need to go to the Admin area and add all the Strains, Items (Item Names for products), and Locations their business license is or is planning to cultivate or create. *Transporters will only need to add employees to Metrc and no other Admin or inventory information.* 

Items can be updated only if the item has not been used previously. Each of these areas of Metrc is accessible via the Admin area dropdown on the navigational toolbar.

For all beginning live plant inventory, those plants will be entered/brought in through the immature plant batches area. All other inventory will be brought in via external transfer. To bring in and create your beginning inventory, each of the strains must be created in the facility's Metrc account. The potency and Indica/Sativa genetics can be guessed if it is not actually known as those estimated values can always be edited later, if needed.

Strains must be created prior to strain specific items. To create a Strain(s), go to the Admin area on the navigational toolbar and select the Strains option from the dropdown. Once in the Strains grid, click the Add Strains button - **see Figure 5**.

Ø	metrc	Pl	ants   <del>-</del>	Packages   🕶	Transfers   🗸	Financials   -	Rep	orts   🗸	Admin 👻	
S	trair	າຣ							Tag Orders Tags	
L	Add St	raina	Edit Strair						Locations	
	Auu Si	ains	Euit Stiali	15					Strains	
	Str	ain					:	Testing	Items	
	<ul> <li>Blue</li> </ul>	Dream						None	Transporte	rs
	► Flo							None	Employees	

Figure 5: Admin Navigation (Strains)

This will open the Add Strains action window to enable the adding of the strain(s) needed. The Strain name, Testing Status, THC and CBD as well as the indication of Indica and Sativa should be entered/designated. The Strain can also be added for multiple license facilities simultaneously if needed by selecting the check box next to the licensed facility listed on the right side of the Add Strains action window. Once the strain information has been entered, click the Create Strains button to complete the process of creating a strain - **see Figure 6 below**.

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Add Strains							×
Strain # 1							(clear)
Name Testing Status	Blue Dream None	v	THC <sup>1</sup> CBD Indica Sativa	13.2 0 • • • • • • • • • • • • • • • • • • •	25 50 25 50	75 100 75 100	Acme Cultivator   AMCC0001-G     Acme Dispensary   AMCC0003-D     Acme Processor   AMCC0002-P     Acme Testing Lab   AMCC0004-L     Check all Check none
+ 1 C	IC potency as a percentage f a particular strain tested as is potency can drastically chang the average potency percents Create Strain	of the overall weigh laving 15% THC pote le even between a sir ge from all tests in th	<b>t.</b> ncy, then every igle plant or fro e prior two year	gram of d n plant to s. If no te	ried flower o plant. So, th sts have bee	f that strain h e percentage n conducted p	as <b>0.15</b> grams of THC. that should be entered into lease use your best estimate.

Figure 6: Adding Strains

After strains have been created, individual items need to be created with an item name, associated category of product, a default unit of measure, and any other required item elements based on the category.

To create an item, go to the Admin area on the navigational toolbar and select the Items option from the dropdown - **see Figure 7**.



Figure 7: Items option in Admin area

Once on the Items grid, click the Add Items button - see Figure 8 below.

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This will open the Add Items action window to be able to create an item. In the example below, seeds are being brought in so an item will need to be created. The item name of "Seeds – Blue Dream" is used to describe the seed package that will be brought in, indicating the item category of seeds and the strain of Blue Dream – **see Figure 9**.

					(clear
Name	Metrc Bliss Seeds	Unit	of Measure	Each	``````````````````````````````````````
Category	Seeds	~	Strain	Metrc Bliss	```
Product Photos Description	Product Photos Description	//			
• 1 🗘 (pro	oduct photo)				
Label Photos Description	Label Photos Description	//			
• 1 🗘 (lab	el photo)				
Packaging Photos Description	Packaging Photos Description	//			
• 1 🗘 (pa	ckaging photo)				
• 1 🗘 (ing	redient)				
+ 1 0	item)				
Why is there n Certain Item Cate	o multi-Facility create such as that gories require the selection of a pre-exis	t <b>available</b> ting Strain. \	in Employee	es, Strains, and Loc forming that the specifi	ations? ied Strain exists
o create Items in	multiple Facilities at the same time.	Inplex to Info	JIII. FOI UIIS IE	ason we have opted to	mot add the ability

Figure 9: Adding Items Action Window

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Further details on all Admin related setup and tagging information can also be found in Metrc Expert or Metrc Learn Training. Also, it is covered in the Metrc New Business Training which all cannabis business license employees can register for at <u>here</u> or in the Advanced Cultivation Training, Advanced Processor/Product Manufacturer Training, Advanced Dispensary Training, or Advanced Testing Facility Training.

#### All Facility Types – Creating Beginning

All beginning inventory will need to be brought into your license to ensure your Metrc electronic inventory matches your physical inventory on hand. Transporters will not bring in any beginning inventory.

When reporting beginning inventory for a Cultivation license, newly created immature plant batches are created to reflect the seeds or immature plants that are being or have been planted into the active inventory. For further information regarding how to enter beginning inventory for Immature Plant Batches, please see section Cultivation Only: Creating Beginning Inventory Plants.

#### **External Incoming Transfers Steps**

For all other beginning inventory, External Incoming Transfers are used to bring in the packaged product for seeds (that are not planted), raw plant material, or packaged products. This is a two-step process which will require creating an External Transfer and packaging the products. External incoming transfers should be used for all beginning inventory.

### Both steps must be completed for the tagged packages to be reflected in your Metrc inventory.

#### **Creating an External Incoming Transfer**

To create an External Transfer, go to the Transfers area on the navigational toolbar and select the External option from the dropdown menu. From the External Transfers grid, select the Incoming tab. Then select the "New Transfer" button- **see Figure 10 below**.

<b>⊘metrc</b> Plants   ▼ Packages   ▼	Transfers   -	Finar
External Transfers	Licensed Templates	
	External	
View Manifest		
Incoming Outgoing		
New Transfer		_

Figure 10: Incoming External Transfers



This will open the New Incoming Transfer action window to create an External Transfer to bring in seeds or other packages of product for beginning inventory. Complete the fields as follows:

**<u>Type</u>**: Select the Beginning Inventory Transfer option from the dropdown menu.

**Phone Number:** Enter a valid phone number. This can be designated as the business phone number.

**Planned Route:** This can be stated as "Received and verified at the Licensed Business #\_\_\_\_\_ by the Metrc Admin."

**Item Name, Quantity, and Packaged Date:** These fields correspond to the specific items (the items that were previously created) and quantities being brought in for beginning inventory. The date packaged should be the day that the items are being entered into Metrc. The quantities should be exact and should account only for the product being received.

**External Identifier:** This field is where the corresponding Item Approval ID # (NDC Code) should be entered in order to correlate the new Metrc Package ID for beginning inventory with the existing Item Approval ID # from the CCA.

Once all required information has been entered, select the "Register Transfer" button to create a pending incoming transfer – **see Figure 11 below**. Creating a pending incoming transfer from Step 1 does not immediately associate Metrc package tags with those items. Without completing the External Incoming transfer, a licensee will not show the proper inventory and will not be in compliance with inventory reconciliation requirements.

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### Beginning Inventory Guidelines for Virginia

Туре	Beginn	ing Inventory	Ý							
Phone No.	ex. +1-1	123-456-7890								
lanned Route					Invoice Number	En	ter the Ir	woice Nu	mber	
					Est, Departure		04/14/	2025		today
						^		^		
							04 :	28	PM	
						*		*		
					Est, Arrival	=	04/14/	2025	Ē	today
						^		•		
						*	04	•	FM	
Pack	age # 1	Type part of th	e Item name	Q	(dear) Package Date		mm/dd	1/уууу	ē	today
0	Juantity	ex. 100.23	- Select -	~						
E	External Jentifier	Enter Externa	Id							
0 1	(pa	ickage)								

Figure 11: Register Incoming Transfer

#### **Completing the External Transfer**

The Incoming External Transfer must be completed in order to receive and create the beginning inventory. Clicking "Register Transfer" does not create tagged packages in your inventory.

Each License **MUST** have package tags available to complete this step. To complete the pending Incoming External Transfer, select the "Complete" button on the far right of the External Transfer needing to be received in the External Transfers grid - **see Figure 12.** 

w Manifest												
coming Inactive												
New Transfer												A· · · E·
Manifest	: Origin	: Туре	E Pkgts	: EXD	: ATD :	EIA	E ATA	E Received	: ETRD	: ATRD	: ETRA	: ATRA :
0000001301 Ø		Beginning Inventory	1	08/04/2024 11:36 pm		08/04/2024 11:36 pm						

Figure 12: Incoming External Transfer Grid



This will open the Complete Incoming Transfer action window to enter the required information. The quantities entered in Step 1 will be auto-populated; confirm the accuracy of the quantities and assign a unique Metrc package tag to each item. The package tag assigned to the seeds or other products in the system should be physically affixed to the associated product. Once the information is confirmed as accurate, then click on the "Complete Transfer" button to create the package(s) with the specified quantities in the inventory - **see Figure 13**.

Manifest	0000003201		Transfer Type	Beginning Inventory				
Origin Lic. No.			Origin Name					
Main Phone No.	13122356522		Mobile Phone No.					
none No. for Questions								
Employee ID			Vehicle Make					
Driver's Name			Vehicle Model					
Driver's Lic. No.			License Plate					
Package # 1	1A4FF03000001600000253	۹	Item 0408 06	:32 Buds	Shipped Oty,	100	g	Reject
Location	Packages Vault 1	۹			Receive Oty,	100	Grams	5
External Id	1234567891012365							

Figure 13: Complete Incoming Transfer

#### Please keep in mind:

- When bringing in beginning inventory for any packaged product, the product will come into Metrc as Not Submitted (as a testing status).
- All employees should take the Metrc New Business Training which all cannabis business license employees can register for at <u>here</u> as well as the Advanced Cultivation Training, Advanced Processor/Product Manufacturer Training, or Advanced Dispensary/Store Training, Advanced Testing Facility Training, and Facility specific Journeys in order to be successful in working in Metrc.

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#### **Cultivation Only: Creating Beginning Inventory Plants**

After bringing in all your beginning inventory via External Transfers, your licensed Metrc account should have all medical cannabis inventory reported within the license number. Seeds and other Plants can now be planted within the Plants section of Metrc. All plants will need to be planted as Immature Plant Batches for the beginning inventory and then moved to the Vegetative or Flowering phases as needed to reflect where the plants are physically at the time of beginning inventory. If planning on storing seeds, meaning they would not be planted as a live immature plant yet, those seeds would be kept in strain specific package(s) per the Beginning Inventory section above.

Follow the steps below to plant seeds or plants into Immature Plant Batches for beginning inventory.

Once logged into Metrc, go to the Plants area on the navigational toolbar. In the Plants grid, go to the Immature tab and click the Create Plantings button – **see Figure 14 below**.



Figure 14: Create Plantings button in Immature tab in Plants grid

This will open the Create Plantings action window to create the Immature Plant Batch. A preferred naming convention should be used for the Group Name. The plantings are required to be strain specific. It is Metrc's best practice for the Group Name to include the Strain Name and date of planting. The example below would be how it is recommended to enter an immature plant batch of Blue Dream Plants for beginning inventory where the Group Name is labeled as **Blue Dream 4.1.25 Beg Inv.** 

Strains and Locations must already have been created in the Strains and Locations grids under the Admin area on the navigational toolbar for selection here. Use the date of the original planting for the "Planting Date." Once the information has been entered, click on the "Create Plantings" Button to create the planting(s) – **see Figure 15 below**.

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### Beginning Inventory Guidelines for Virginia

Create Plantin	gs	×
Planting # 1		(clear)
Batch Name	Blue Dream 4/1/2025 Beg Inv	(contents)
Plants Type	Seed v	
Plants Count	100 🗘	
Strain	Blue Dream Q	
Planting Date	🗰 04/01/2025 📫 today	
Location	Immature Plant Location Q	
+ 1 0		
	Create Plantings Cancel	

Figure 15: Creating Immature Plantings

Once the Immature Plant Batch has been created, it can be seen in the Immature tab of the Plants area on the navigational toolbar.

Once the Immature Plant Batch has been created, then the plants can be moved to the appropriate growth phase using the original phase dates the plants were moved to mirror your physical inventory. Below is an example of some Vegetative Plants that have been created as part of the beginning inventory and will now be moved to the Vegetative Phase. To move those plants, in the Immature tab, select the Blue Dream 4/1/2025 Immature Plant Batch that was created for the Beginning Inventory and then select the Change Growth Phase button – **see Figure 16**.

Øn	netrc.	₩ *	Plants   <del>+</del>	Packa	ages   👻	Transf	ers 🔻	Fina	ancials	<del>-</del> R	eports	-	Admin	•		
ΡI	ants															
	Immature	On Hold	<u>Inactive</u>	2	Vegetat	tive <u>Flo</u>	wering	On	Hold	Inactive	2	Han	ested	On Hol	d Inactiv	<u>e</u>
	Create F	lantings	Create Pag	ckages	Split P	lantings	Rena	me	Chang	e Strains	Ch	ange L	ocation	Chang	je Growth P	hase
	Plan	t Batch	:	Strain	1 1	Location		-	<u>Type</u>		Hold	-	Plants	:	Tracked	:
	► Blue I	Dream 4/1/20	25 Beg Inv	Blue D	ream	Immature	Plant Loca	ition	Seed		No		<u>100</u>		0	
	K	1 Pa	ige 1	of 1		20	▼ row	s per	page							

Figure 16: Change Growth Phase button to Move Plants to Veg

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This will open the Change Immature Plants Growth Phase action window. Enter the Plants Count for the number of plants being moved to the Vegetative phase in the Plants Count field. Use the magnifying glass to select the next available plant tag to start the sequence of tags for the plants having their growth phase changed. The system will automatically assign the next consecutive set of tags in the serialized sequence and auto-populate the ending tag number in the Ending Tag field. Then select the New Phase from the drop down menu. In this case, select the Vegetative Phase. Then select the New Location where the plants will be moved into from the drop down menu of options in the New Location field. Then populate the Change Date with the date that the plants were originally moved into the Vegetative phase prior to beginning inventory. The Today button can be selected if the plants are moving for the first time today from Immature to the Vegetative phase. Once all information has been entered and verified as accurate, click the Change Phase button to complete the move of the plants from Immature to the Vegetative phase – **see Figure 17**.

					0					
Plant Batch	Blue D	ream 4/	1/2025 Be	eg Inv	q	New Phase	Vegeta	ative		~
Plants Count	25	\$	Tags	25		New Location	Veg Lo	ocation A		~
Starting Tag	1A4FF	0200000	00160000	00412	Q	(optional)				
Ending Tag (tags optional)	1A4FF	0200000	0160000	00436		Change Date	<b>m</b> 0	4/07/2025	Ö	today
+ 1 🗘										

#### Figure 17: Change Immature Plants Growth Phase

If there are beginning inventory plants that need to move to the Flowering phase, those plants can be moved from the Vegetative tab in the Plants grid area. Select all of the plants needing to be moved and then select the Change Growth Phase button – **see Figure 18**.

≎me	etrc.	×	Pla	nts   <del>-</del>	Packag	es   🕶	Transfers	Financi	als   👻 🛛 F	Reports	✓ Adm	n   <del>-</del>									
Pla	ants																				
	Immature	e <u>On F</u>	Hold	Inactive	1	/egetative	Flowerin	g <u>On Hol</u>	d Inactiv	e I	Harvester	On Hold	Inactive	<u>Addit</u>	ives W	aste					
	Assigr	n Tags	Replac	e Tags	Change	Strains	Change Lo	cation Ch	ange Growth	n Phase	Change	by Location	Destroy	Record A	dditives	Record Waste	Creat	e Plantings	Manicure		
	Ta	g				Strain	1	Location	:	Hold	1	Plant Batch		:	Plant Bal	ch Type	1	Plant Batch	n Date	:	Phase Date ↓
	► <u>1A</u>	4FF020000	0016000	0000412		Blue Dre	am	Veg Location	A	No		Blue Dream 4/	1/2025 Beg Inv		Seed			04/01/2025			04/07/2025
		4FF020000	0016000	000413		Blue Dre	am	Veg Location		No		Blue Dream 4/	1/2025 Beg Inv		Seed			04/01/2025			04/07/2025
		4FF020000	0016000	0000414		Blue Dre	am	Veg Location		No		Blue Dream 4/	1/2025 Beg Inv		Seed			04/01/2025			04/07/2025

Figure 18: Change Plants Growth Phase from Vegetative to Flowering

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This will open the Change Vegetative Plants Growth Phase action window. In this action window each plant is listed, and the template can be used to auto-populate for all plants down below by populating the template and then selecting the checkmark boxes to the right of each field. In the example below, the Flowering phase was selected. The New Location is the Flower Location A and the Change Date is 4/14/2025. Once all fields have been selected or entered, the checkmarks were clicked and the information from the template is populated below for each of the plants being moved from the Vegetative phase to the Flowering phase. After all required fields have been entered, click the Change Phase button at the bottom of the action window to move the plants from the Vegetative phase to the Flowering phase – **see Figure 19**.

<u>Change Veget</u>	ative Plants Growth Phase							
Template			New Phase	Flo	wering	~ 🗸		
			New Location	FIO	wer Location A		Q	
			Change Date		04/14/2025	Ö	today	
Plant # 1								-
Plant	1A4FF02000001600000412	٩	New Phase	Flo	wering		~	
Replace Tag (optional)	Type part of the Tag number		New Location (optional)	Flo	wer Location A	۹		
			Change Date	Ħ	04/14/2025	Ö	today	
Plant # 2								-
Plant	1A4FF02000001600000413	٩	New Phase	Flo	wering		~	
Replace Tag (optional)	Type part of the Tag number	٩	New Location (optional)	Flo	wer Location A		۹	
			Change Date	Ħ	04/14/2025	Ö	today	]
Plant # 3								-
Plant	1A4FF02000001600000414	٩	New Phase	Flo	wering		~	
Replace Tag	Type part of the Tag number	٩	New Location	Flo	wer Location A		Q	
(optional)			Change Date	Ħ	04/14/2025	Ö	today	
+ 1 0								
	Change Phase Ca	ancel						

#### Figure 19: Change Plants Growth Phase from Vegetative to Flowering

#### **Cultivation Only: Harvested Product**

To bring in beginning inventory for plants that have been harvested, that product will need to be packaged up and brought into Metrc via the External Transfer as shown previously. All product should be packaged strain and harvest specifically and brought in via the External Transfer so a new Metrc package tag can be assigned for that harvest batch package.

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#### **Beginning Inventory and Testing**

All beginning inventory will have a testing status of Not Submitted. Best practice is to move all tested product out of the active inventory and over to the dispensary to be sold prior to bringing in your beginning inventory if possible.

If there is any product at the Cultivation or Processor/Product Manufacturer facility that cannot be transferred for sale before being added to your Beginning Inventory—and it was tested prior to Metrc—then, with agreement from your testing facility, the following process can be used to update its testing status:

#### Submitting a Virtual Test Sample

In coordination with the testing facility you had the package previously tested at, you can submit a "Virtual Test Sample" to the testing facility by test sample workflow. And they can agree to helping you do this. Below is how to submit a "Virtual Test Sample" along with all of the pertinent information that goes with the sample.

Select the package brought in via the External Incoming Transfers workflow and select the Submit for Testing button.

≎m	etrc.	-	Plants   -	Pac	kages   <del>-</del>	Transfers   -	Financia		<b>-</b> Rep	orts	s   <del>-</del> Admin									
Pa	cka	ges																		
	Active New F	<u>On Hold</u> Packages	Inactive Submit for Te	!	In Transit	Transferred	ntings	Ne	ew Transfer	)(	Add Processi	ng Job	Chang	le Loca	tions	Change Ite	ns Change	Rec	<u>I'd LTBs</u> Ac	dji
	I	1g.		:	Src. H's	Src. Pkg's			Src. Pj's	:	Location :	Subloo	cation :	Item	-	Category :	Item Strain	:	Quantity :	
	<b>ب</b> م	1A4FF03	0000016000000	273							Packages Vault 1			Bear Down Bites 50mg (NLS#	)	Edible Food (Final Form)			100 ea	

#### Figure 20: Creating a Virtual Test Sample

This will open the Submit for Testing action window for the New Virtual Test Sample. Assign a new Metrc Package Tag and fill out the other required information for the Virtual Test Sample. It is important that in the Note field you enter the Batch ID# of the package that has been tested and passed previously for the testing facility to reference. Lastly, select the Required Testing that was previously done for the package and click the Submit for Testing button. **Please Note**: Keep in mind that if the wrong Lab Test Batch for the testing is chosen, the product will be Testing in Progress after the test

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results have been entered into Metrc so please ensure the correct Lab Test Batch panel is selected.

Submit for Testing ×										
New Packa	age Sample # 1			(clear						
New Tag	ABCDEF012345670000012413	ABCDEF012345670000012412 Q	>							
Location	Package Vault	Q		Current Lab Testing State: Not Submitted						
	Same Item		Quantity	1 ^ Grams y May						
Quantity	1 O Grams	~ Σ	Quantity	Quantity and Adj. UoM have different Quantity Types						
Note	Original Batch #123456789		Quick Entry	Quick entry packages OFF						
Package Date	■ 05/07/2025	today	(contents)							
Required Testing	<ul> <li>Concentrate/Extract - Bulk (Unfill</li> <li>Concentrate/Extract - Final Form</li> <li>Infused Edible</li> <li>Infused Non-Edible</li> <li>Inhalable Concentrates</li> <li>R&amp;D Testing - Metals</li> <li>R&amp;D Testing - Posticides</li> <li>R&amp;D Testing - Potency (Infused</li> <li>R&amp;D Testing - Potency (Raw Plate)</li> <li>R&amp;D Testing - Terpenes</li> <li>Raw Plant Material - Final Form</li> <li>Varian Material - Unfinished</li> <li>Tinctures</li> </ul>	finished) m (Not Previously Tested) d Products) lant Material & Concentrate/Extract) ts n (Not Tested Previously) d (For Transfer)								
+ 1 0										
Creating Sample More info	Packages immediately locks out the so	ource Package(s) by setting the Testing S	State to SubmittedF	orTesting.						
	Submit for Testing	Cancel								

Figure 21: Adding the original Batch ID # when creating the Virtual Test Sample

From the Packages grid, select the newly created Virtual Test Sample and click the New Transfer button.

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🗢 🗹 🖂 🗸 🔿 Plar	nts   - Packages	- Transfers - F	Financials   - Repo	rts	•			
Packages								
Active On Hold In	active   In Trans	it <u>Transferred</u>		)		1	1	
New Packages Sub	mit for Testing Rem	diate Create Planting	gs New Transfer	Add Processing	Sublection	Change Items	Change Req'd	LTBs Adjust
Lay ► Q. # 1A4FF03000000	116000000273	<u>15</u> : <u>SIL PAUS</u>	: <u>316.713</u>	Packages Vault 1	Bear Down Bites, 50mg. (NLS#)	Edible Food (Final Form)	item Sulam :	<u>99 ea</u>
► Q # 1A4FF0300000	116000000274 💧	1A4FF03000001	1600000273	Transfer Vault	Bear Down Bites 50mg (NLS#)	Edible Food (Final Form)		<u>1 ea</u>

Figure 22: Selecting the Virtual Test Sample and New Transfer

This will open the New Transfer action window. In the Destination field enter the Testing Facility license number that ran the previous test on the Virtual Test Sample. In the Planned Route field enter, "Virtual Test Sample" along with the original Batch ID# that references the previously tested batch for the Virtual Test Sample. Select the Testing Facility License for the Transporter. Once all of the other information has been entered, finish by selecting the Register Transfer button.

## Smetrc.

Destination 1	6a-X000	01 Q	(clear)	Туре	Testing Faci	lity Trans	fer	~
anned Route	Virtual T	est Sample	Invoice Number	Enter the Invoice Number				
	Original	Batch ID #1234567890	Est. Departure	₩ 05/21	2025	Ċ	today	
					•	^		
					06 :	30	PM	
				Est. Arrival	▼ ■ 05/21	2025		today
			11		^	^		
$\frown$					06 :	30	PM	
					*	*		
Tran	sport # 1	4a-X0001	٩	(clear)				
P	hone No.	1234567890	(use defa	ult)	Layover			
	Driver 1	Type part of the Driver Name	۹ (	clear) Vehicle 1	Type part	of the ve	hicle make	m Q
Drive	er's Name	Snoop Dogg		Vehicle Make	Chevy			
Em	ployee ID	X00420		Vehicle Mode	Kush Van			
Driver	s <u>Lic.</u> No.	BR549		License Plate				
	0	details)						
•	) (tra	insporter)						
Pack	age # 1	ABCDEF012345670000012413	Q (ck	ear)				
Quic	k Entry	Quick entry packages	OFF					
0	) (pa	ckage)		CSV or TXT file up to	o 4 Mb with one	package li	abel value pe	r line is requ
					Select files.			
1 0 (d	estination)							
ertains to CSV u clude a header /pe chosen doe	uploads, if s row as Lab s not requi	submitting multiple package values lik el, Gross Weight, UOM, and Wholesa re these fields, the upload will not pop	e Gross Weig ale Price in a pulate the valu	ht, Unit Of Measure, or W csv file with each record on les on the page.	holesale Price n a new line. If	please the Trans	fer	

Figure 23: Creating a Transfer for a Virtual Test Sample

Once you have created the Virtual Test Sample, reach out to the testing facility to let them know the transfer has been created and is ready to be received virtually. The testing facility will then virtually receive the sample and enter the batch ID #"s original test results into the virtual test sample. Once these have been entered, the package in your active Metrc inventory will have the appropriate test status along with the test results allowing it to be transferred.



# Adding a Patient in Metrc during the Patient Registry Transfer Period of Time

During the CCA's transitions between patient registries, dispensaries may encounter two formats of patient identification.

#### Paper Written Certifications (No Patient ID):

If a patient presents a paper certification without a patient identifier, dispensaries must generate one using the Seed to Sale Patient ID Generator and inform the patient of their new ID. The Seed to Sale Patient ID Generator is available here: <u>https://form.jotform.com/virginiacca/seed-to-sale-patient-id-generator</u>

Patient ID Formats:

Patient ID Format	Description
X3M9T2Q7JL	A 10-character alphanumeric ID (capital letters and numbers only) from legacy patient registry
PATS9999991	Paper certification generated Patient Identifier / New Patient Identifier

#### Important:

In Metrc, enter only the Patient ID in the "Patient Identifier" field. Do *not* include names, phone numbers, or other personal information.

As always, if there are any questions, please contact Metrc Support.