Beginning Inventory Guidelines for Virginia

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**.

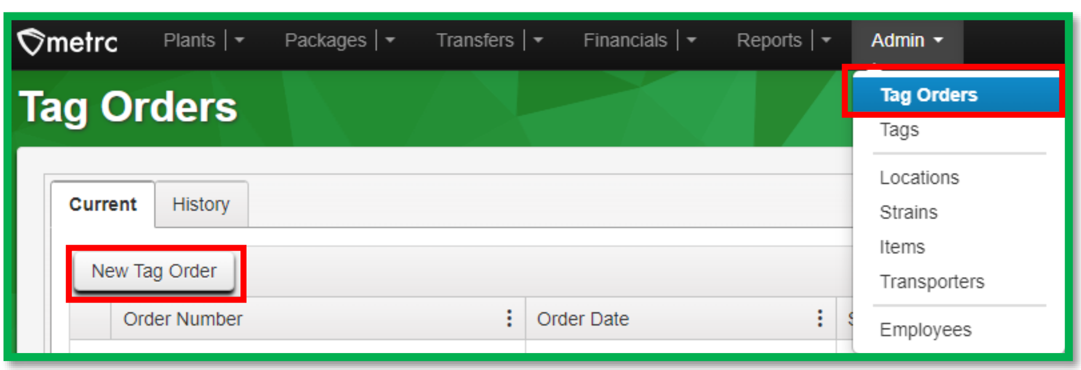

Figure 1: Ordering Tags

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.

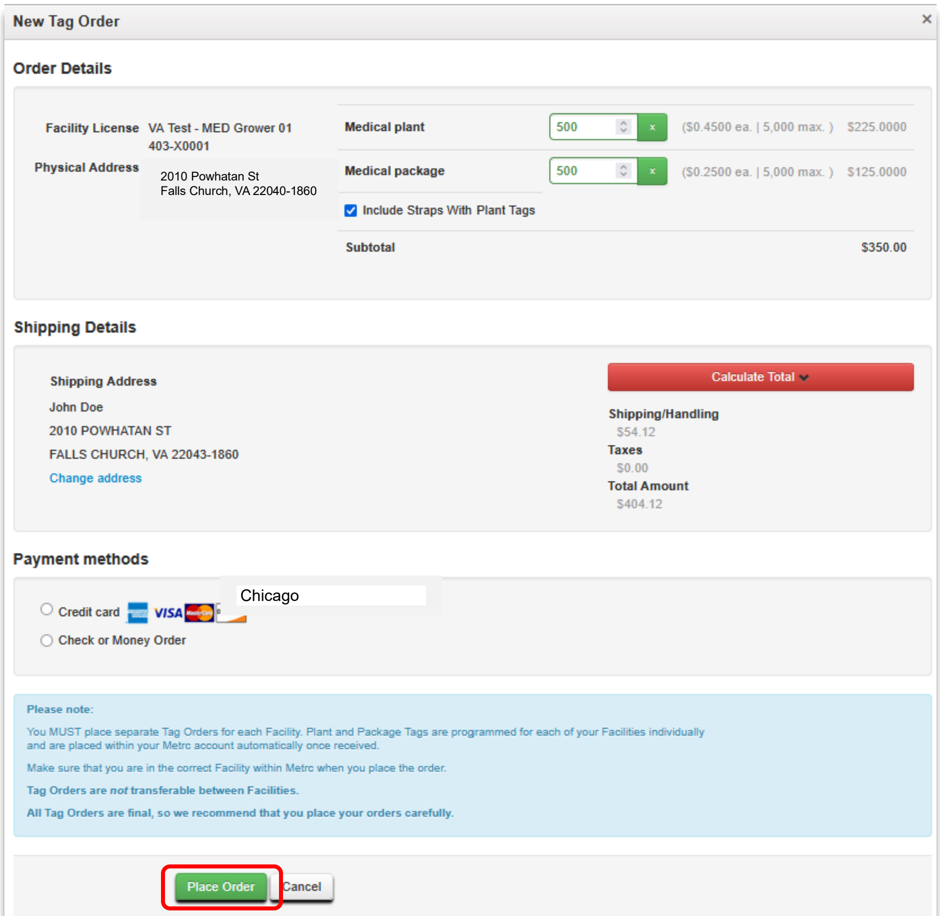

Figure 2: New Tag Order Action Window

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.

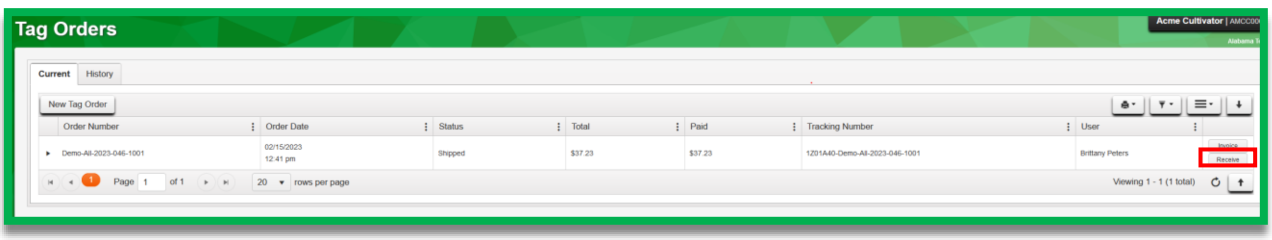

Figure 3: Receiving a Tag Order

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**.

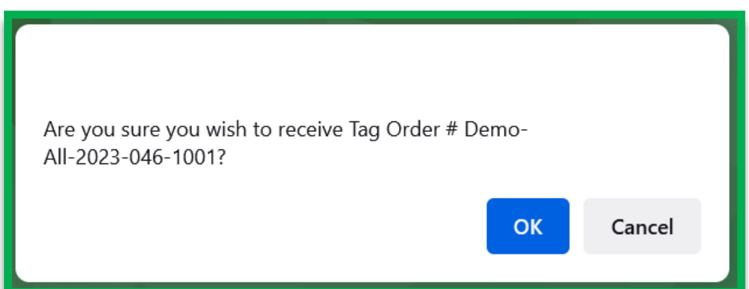

Figure 4: Confirming Receipt of a Tag Order

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

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**.

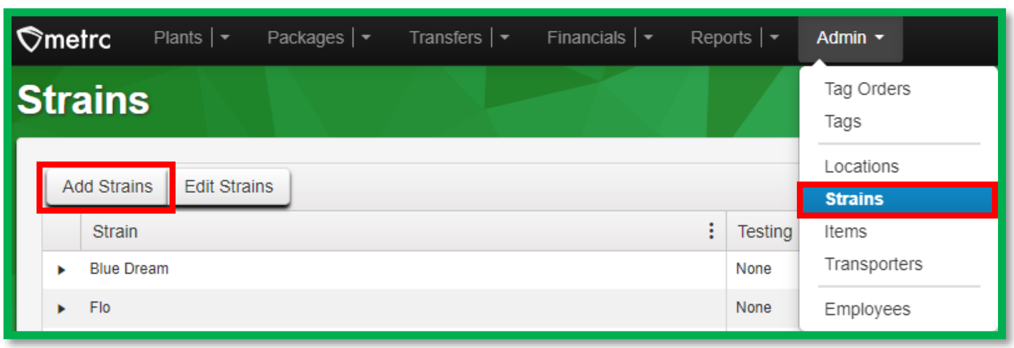

Figure 5: Admin Navigation (Strains)

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**.

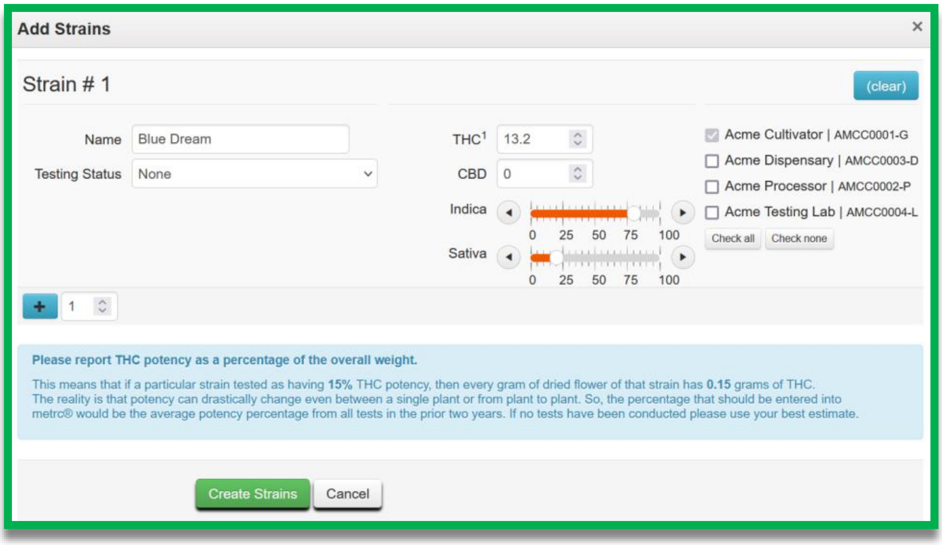

Figure 6: Adding Strains

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**.

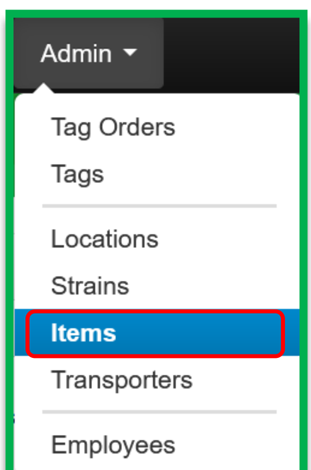

Figure 7: Items option in Admin area

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

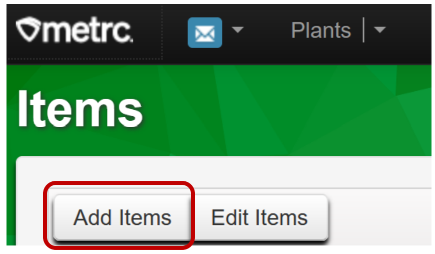

Figure 8: Add Items button

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**.

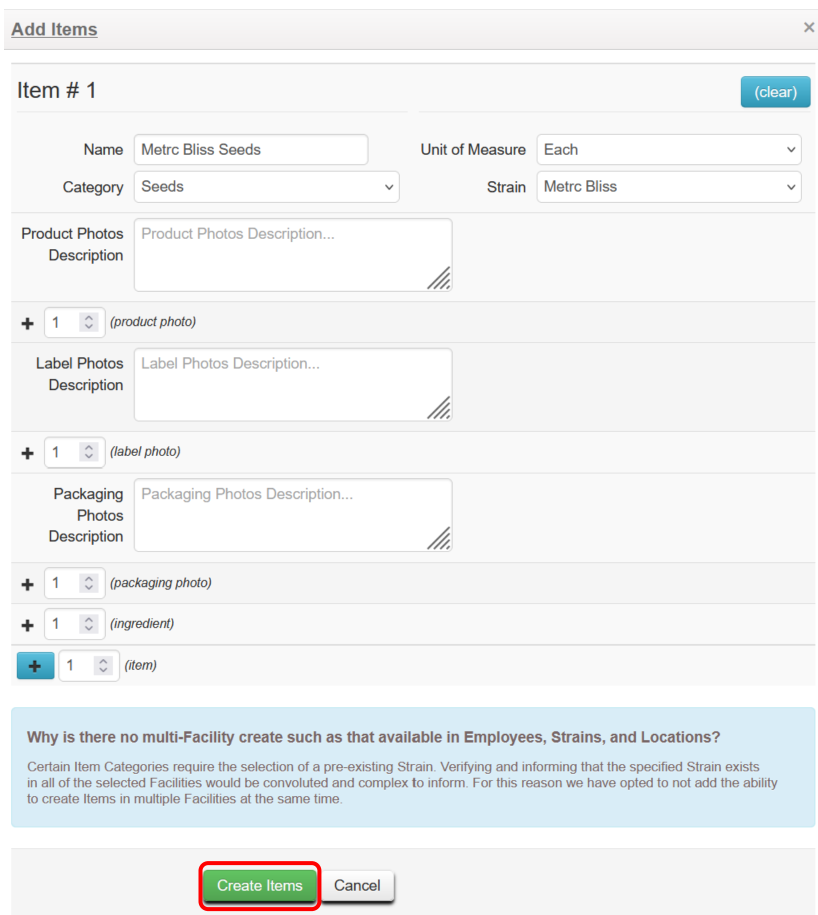

Figure 9: Adding Items Action Window

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 here 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**.

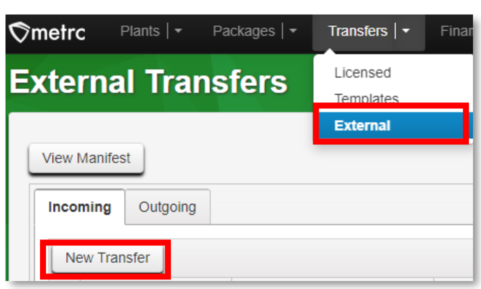

Figure 10: Incoming External Transfers

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.
>
> **<u>Phone Number:</u>** Enter a valid phone number. This can be designated as the business phone number.
>
> **<u>Planned Route:</u>** This can be stated as "Received and verified at the Licensed Business #__________ by the Metrc Admin."
>
> **<u>Item Name, Quantity, and Packaged Date:</u>** 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.

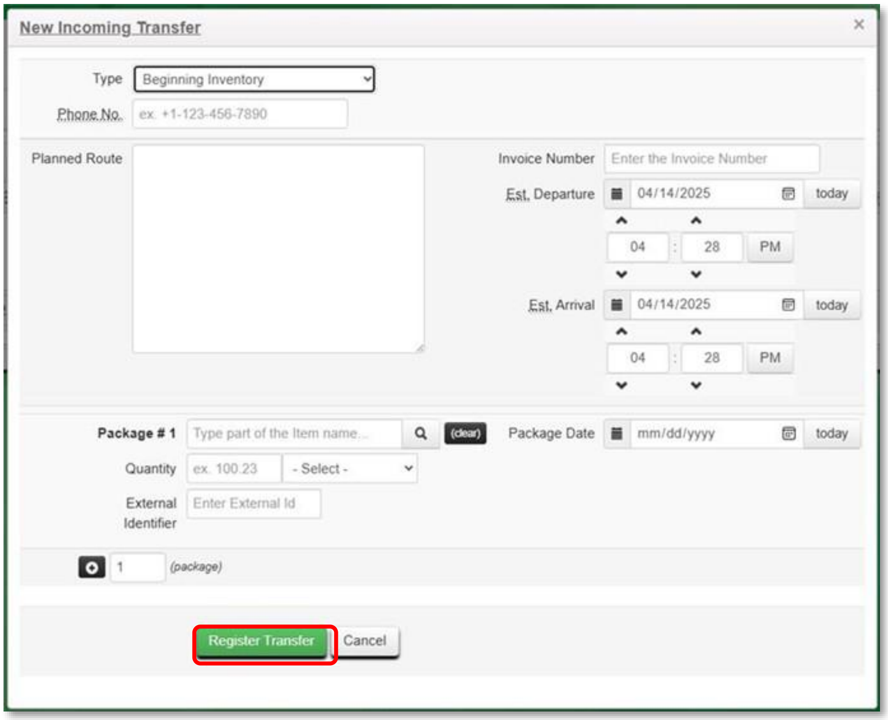

Figure 11: Register Incoming Transfer

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.**

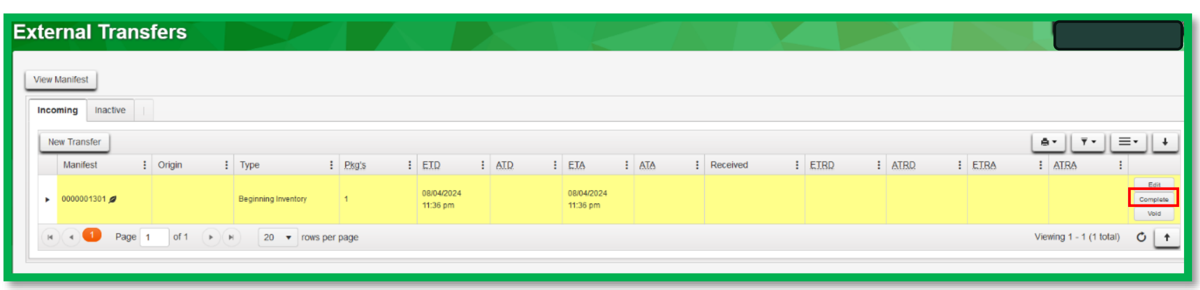

Figure 12: Incoming External Transfer Grid

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**.

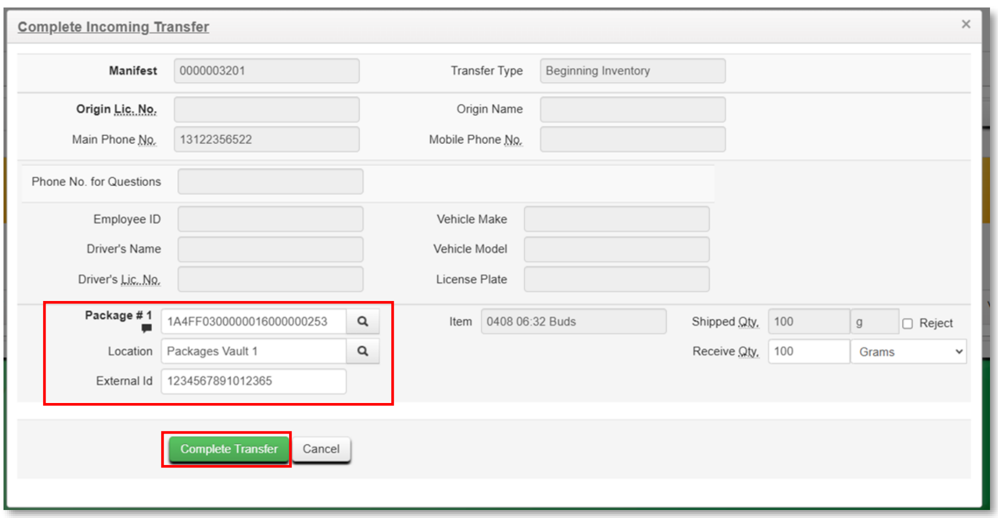

Figure 13: Complete Incoming Transfer

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 here 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.

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**.

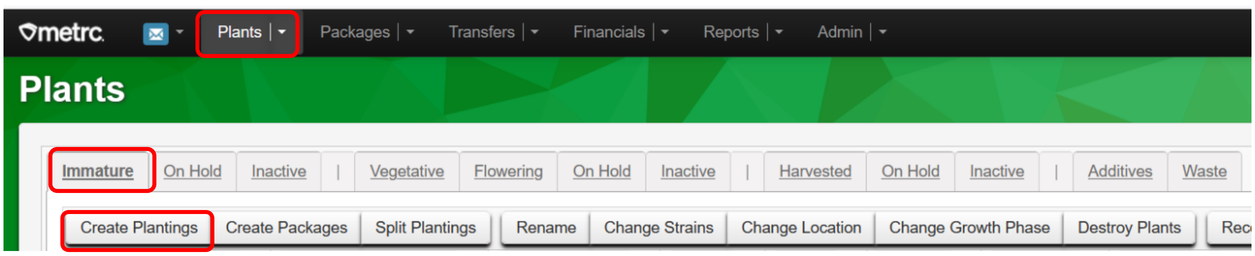

Figure 14: Create Plantings button in Immature tab in Plants grid

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**.

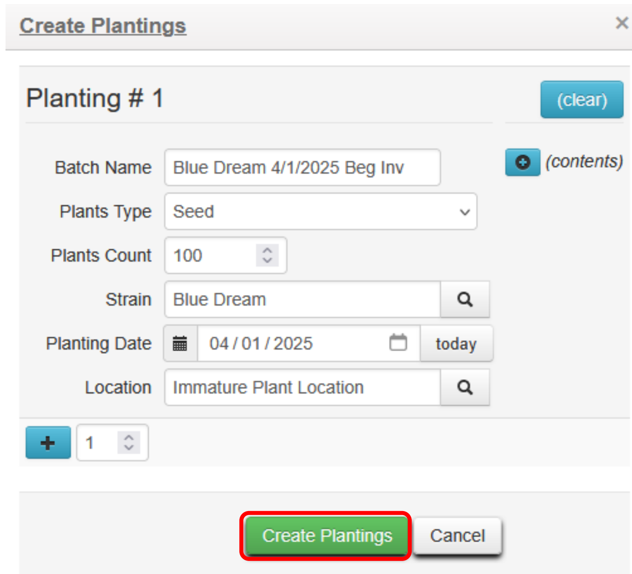

Figure 15: Creating Immature Plantings

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**.

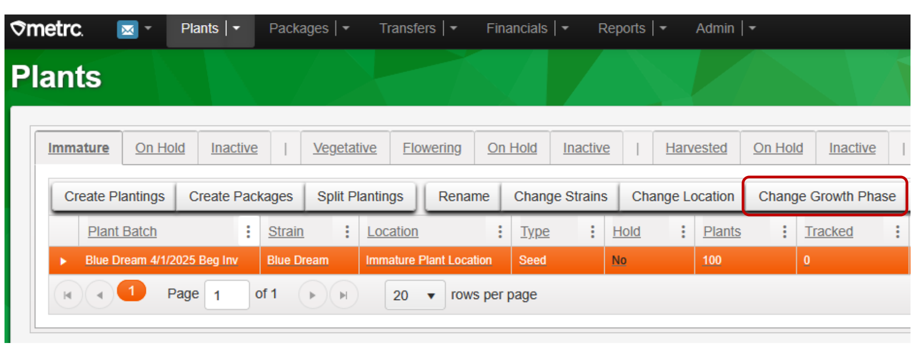

Figure 16: Change Growth Phase button to Move Plants to Veg

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**.

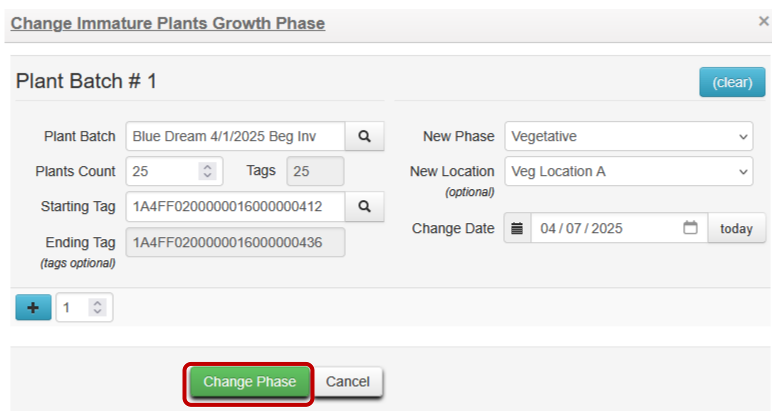

Figure 17: Change Immature Plants Growth Phase

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**.

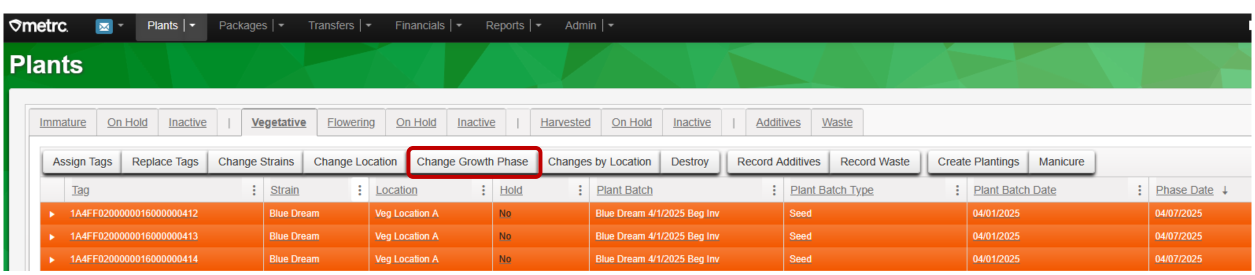

Figure 18: Change Plants Growth Phase from Vegetative to Flowering

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**.

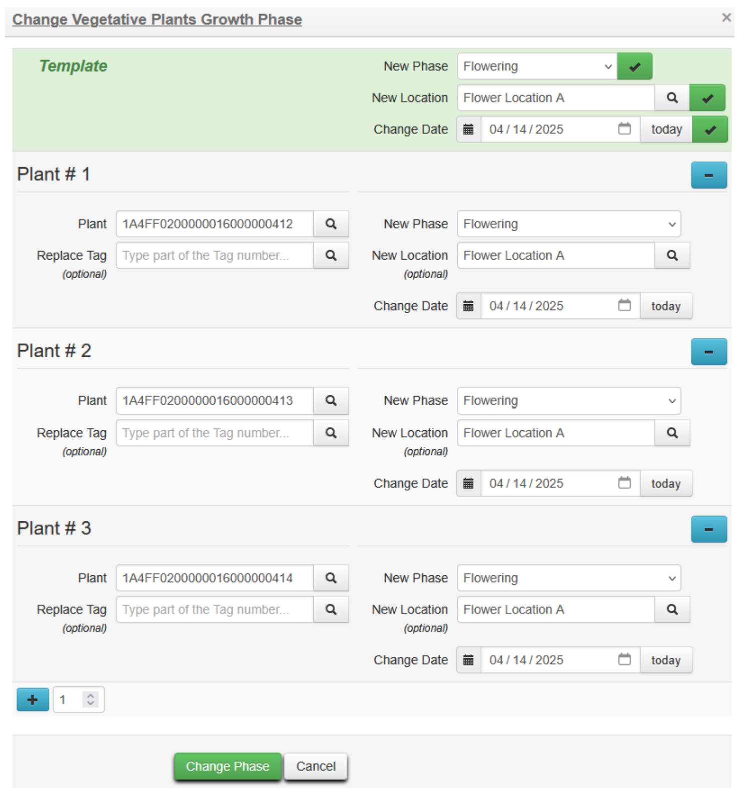

Figure 19: Change Plants Growth Phase from Vegetative to Flowering

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.

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 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.

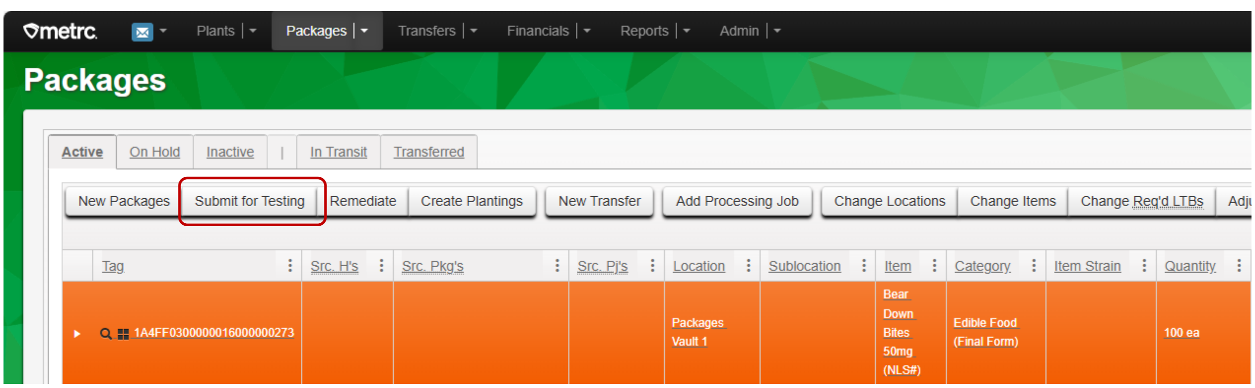

Figure 20: Creating a Virtual Test Sample

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 had 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.

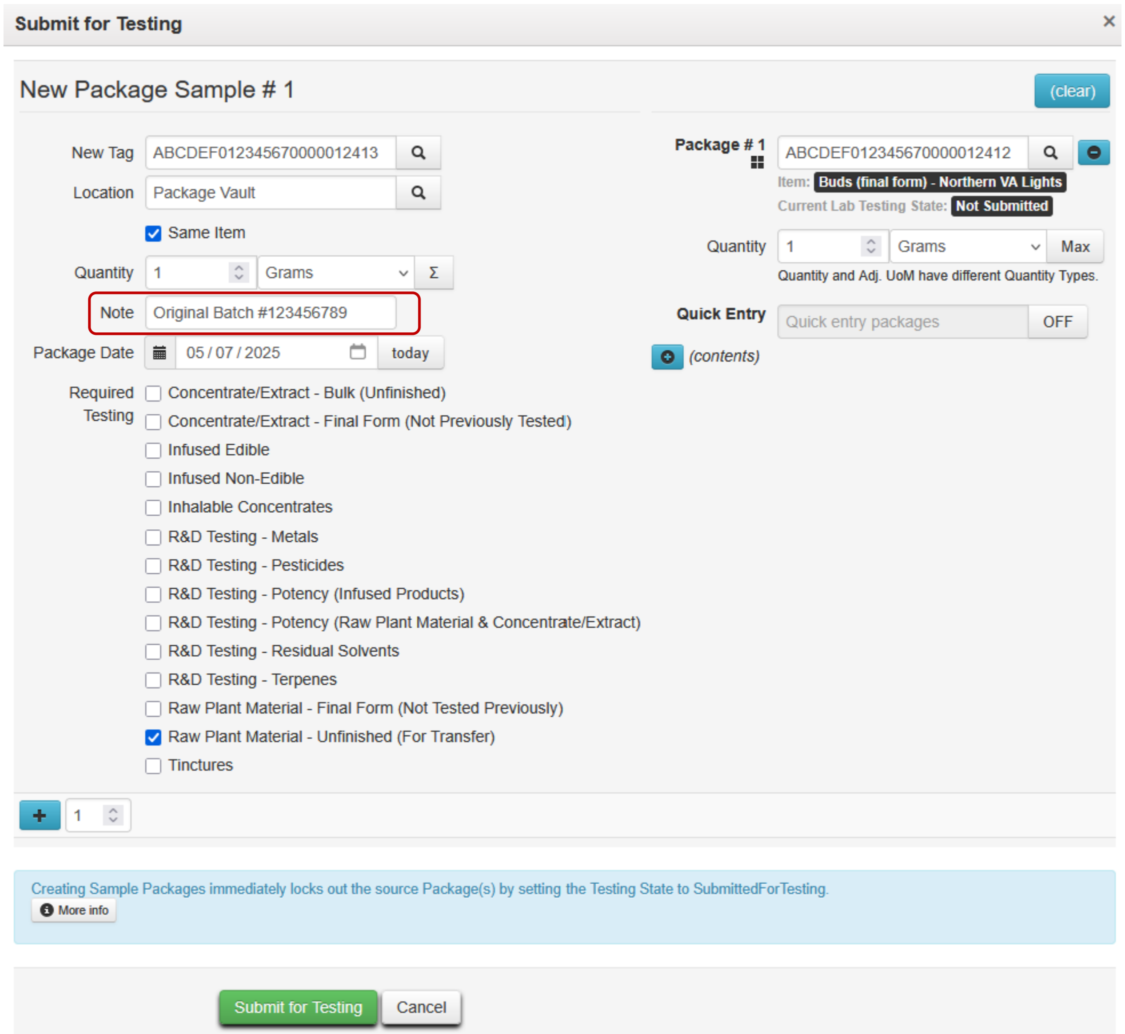

Figure 21: Adding the original Batch ID # when creating the Virtual Test Sample

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

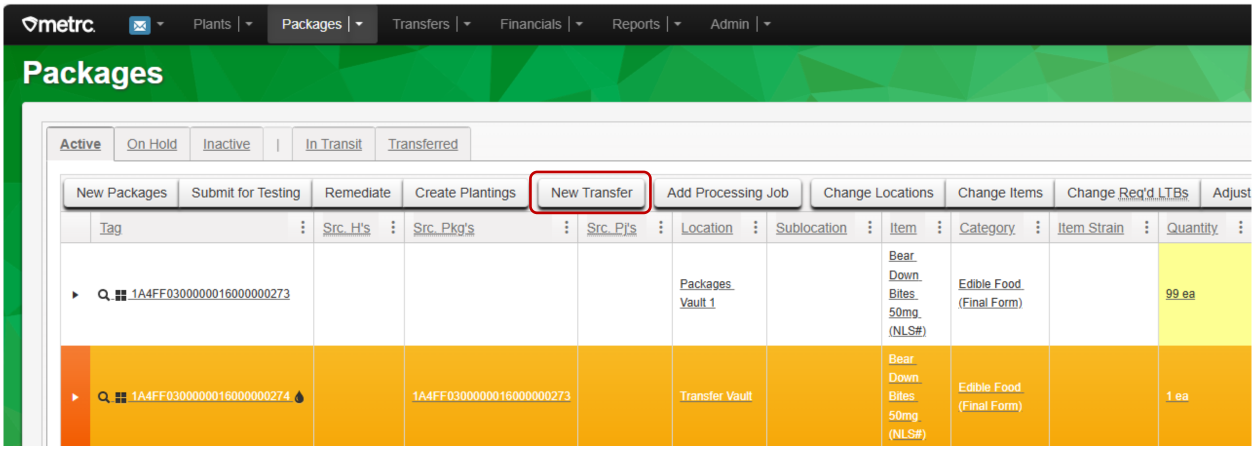

Figure 22: Selecting the Virtual Test Sample and New Transfer

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.

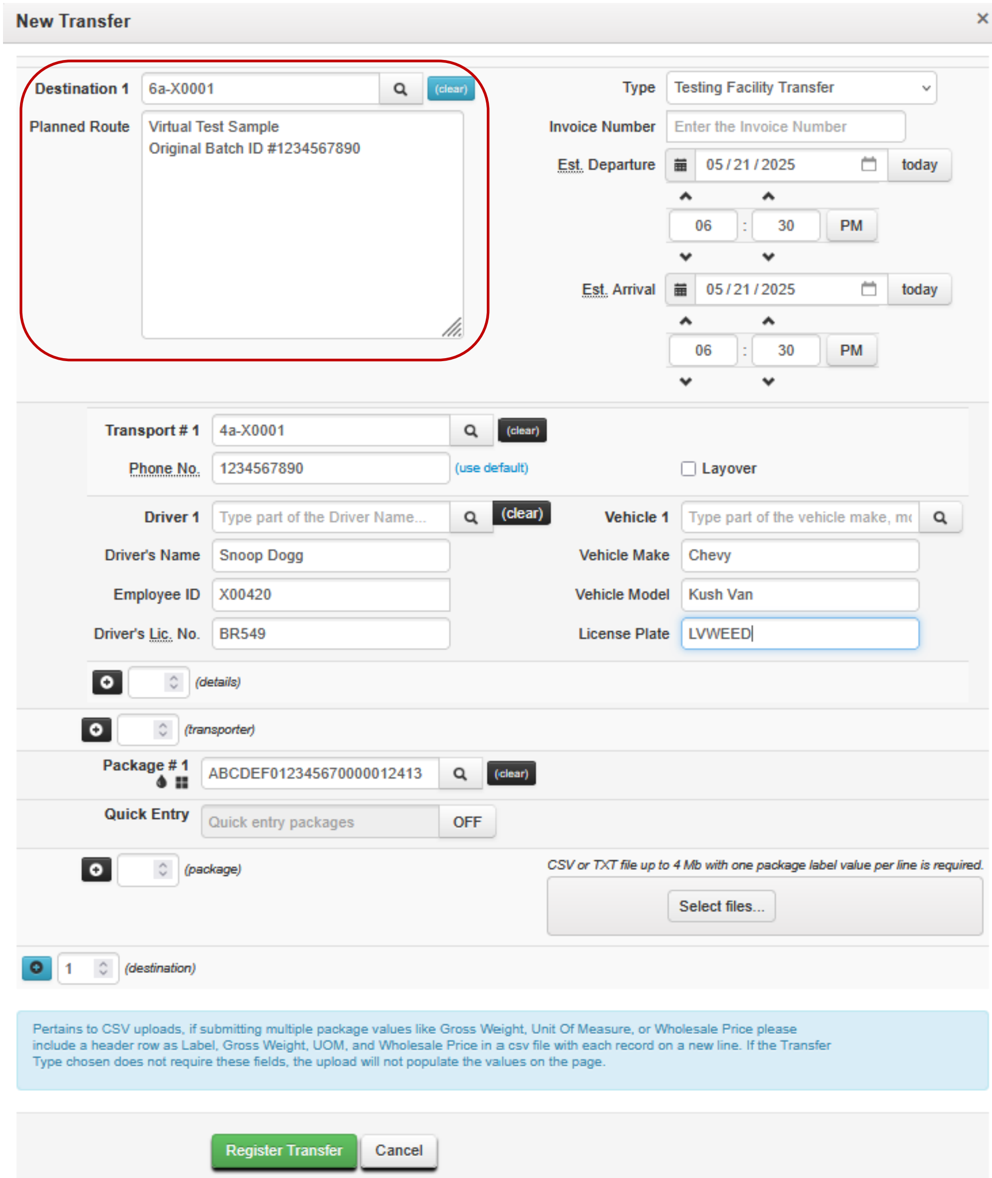

Figure 23: Creating a Transfer for a Virtual Test Sample

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: https://form.jotform.com/virginiacca/seed-to-sale-patient-id-generator

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.