

Bulletin Number: KY_IB_0001	Distribution Date: 06/12/2025	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Beginning Inventory Guidelines	
Reason: To provide the industry with information regarding how to bring beginning inventory into Metrc.		

Greetings,

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.

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 immature plants, harvest batches, or other packages.

Please find more information on the following pages.

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 shipping 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.

Please note if expedited shipping for tags is needed, you will reach out to Metrc Support after placing your order to provide the order number and payment method for which you were requesting expedited shipping.

Once in the Tag Orders grid, click on the “New Tag Order” button – **see Figure 1.**

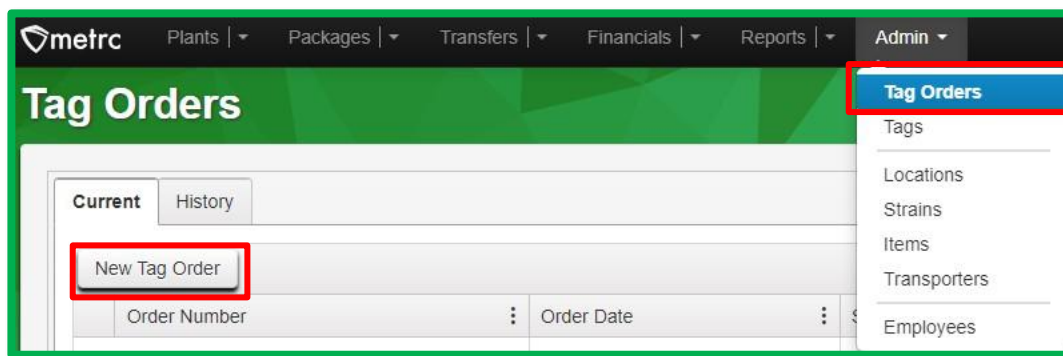


Figure 1: Ordering Tags

This will open the New Tag Order action window to create a tag order - **see Figure 2.**

New Tag Order

Order Details

Facility License

Acme Cultivator
AMCC0001-G

Physical Address

100 Green Grow Way
Hagatna Guam

Medical Plant Tag

500

x

(\$0.4500 ea., 5,000 max.)

\$225.0000

Medical Package Tag

500

x

(\$0.2500 ea., 5,000 max.)

\$125.0000

Subtotal

\$350.00

Shipping Details

Contact Name

John Doe

Phone No.

334-555-5555

Copy from

Facility

Ship Address *

100 Green Grow Way

Address Cont.

City

Hagatna Guam

Calculate Total

Shipping/Handling

—

Taxes

—

Total Amount

—

* Tags cannot be shipped to
P.O. Boxes

Payment methods

Credit card

Check or Money Order

Please note:

You MUST place separate Tag Orders for each Facility. Plant and Package Tags are programmed for each of your Facilities individually and are placed within your Metrc account automatically once received.

Make sure that you are in the correct Facility within Metrc when you place the order.

Tag Orders are not transferrable between Facilities.

All Tag Orders are final, so we recommend that you place your orders carefully.

Place Order

Cancel

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.

Metric 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), 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.

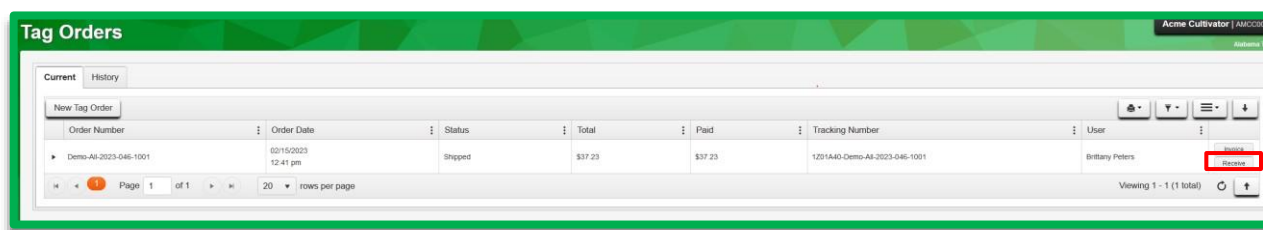


Figure 3: Receiving a Tag Order

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**.

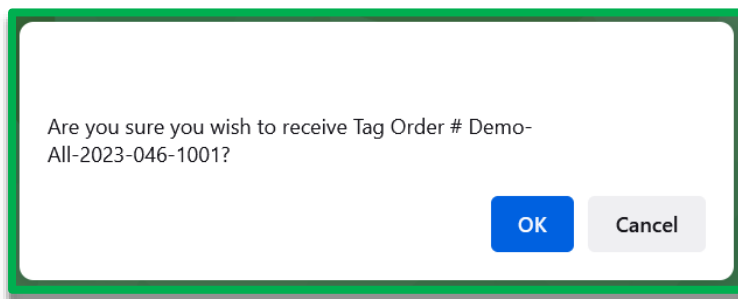


Figure 4: Confirming Receipt of a Tag Order

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

Admin Setup

After a tag order has been placed, licensees based on their license type will need to go to the Admin area and add all the Strains, Items (products), and Locations their business license is planning to cultivate or create.

Please note that additional Strains, Items, and Locations can always be added later as needed. 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.

Prior to bringing in Beginning Inventory, the Licensee shall submit a written request to the Kentucky Office of Medical Cannabis (OMC) via email to kymedcanreporting@ky.gov its start- up inventory. This written request needs to include the number of strains of all medicinal cannabis seeds, seedlings, tissue cultures, clones, and plants being brought into the facility license inventory. Once approved, the licensee will have fourteen (14) calendar days from receipt of the OMC's approval of the written request in which to enter its start-up inventory.

For all beginning live plant inventory, those seeds or immature plants must be brought in through 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.

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**.

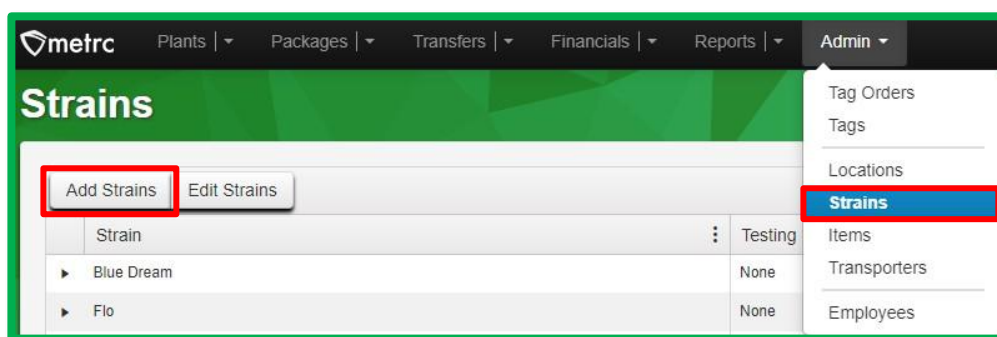


Figure 5: Admin Navigation (Strains)

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.**

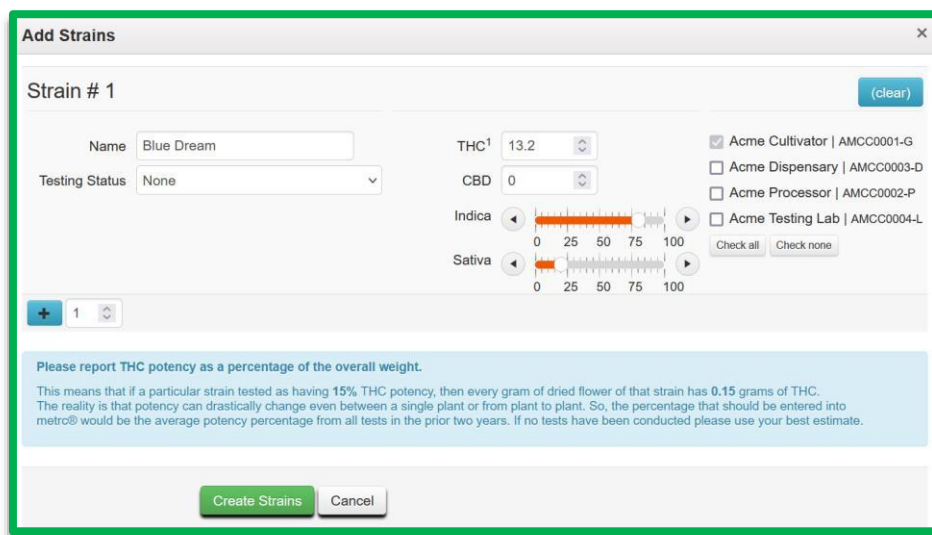


Figure 6: Adding Strains

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.**

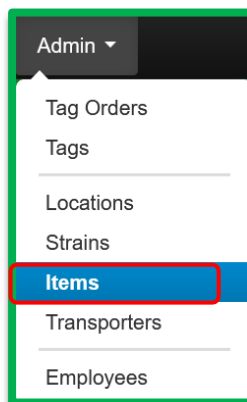


Figure 7: Items option in Admin area

Once on the Items grid, click the Add Items button. 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 8**.

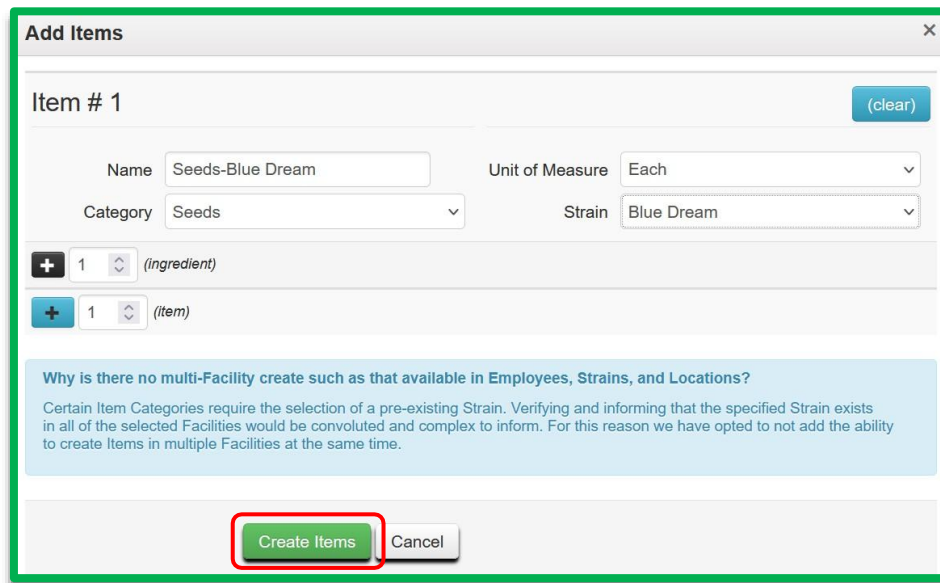


Figure 8: Adding Items Action Window

Further details on all Admin related setup and tagging information can also be found in the Metrc Manual/User Guide under the Support area on the navigation toolbar. Also, it is covered in the Metrc New Business Training which all cannabis business license employees can register for at [here](#).

Beginning Inventory

All beginning inventory will need to be brought into your license to ensure your Metrc electronic inventory matches your physical inventory on hand.

All plants, both clones and mature plants, will be brought into Metrc directly through the Plants section using the “Create Plantings” button in the Immature tab, as shown beginning on page 11. Seeds and packaged product will be brought in through external transfers as described below.

External Incoming Transfers Steps

External Incoming Transfers are used to bring in seeds and packaged product. This is a two-step process which will require creating an External Transfer and packaging the seeds or packaged product. External incoming transfers should be used for all packaged beginning inventory, as well as harvested plant material.

Both steps must be completed in order 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 Transfer grid, select the Incoming tab. Then select the “New Transfer” button- **see Figure 9.**

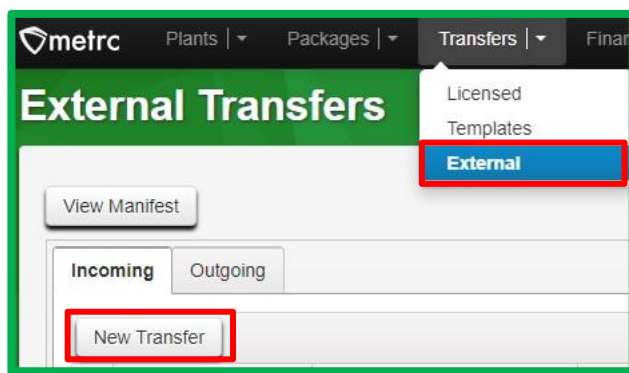


Figure 9: Incoming External Transfers

This will open the New Incoming Transfer action window to create a transfer to bring in seeds or packaged product for beginning inventory – **see Figure 10**. Complete the fields as follows:

Type: 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 weighed at the Licensed Business Number # . Verified 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.

Once all required information has been entered, select the “Register Transfer” button to create a pending incoming transfer. 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.

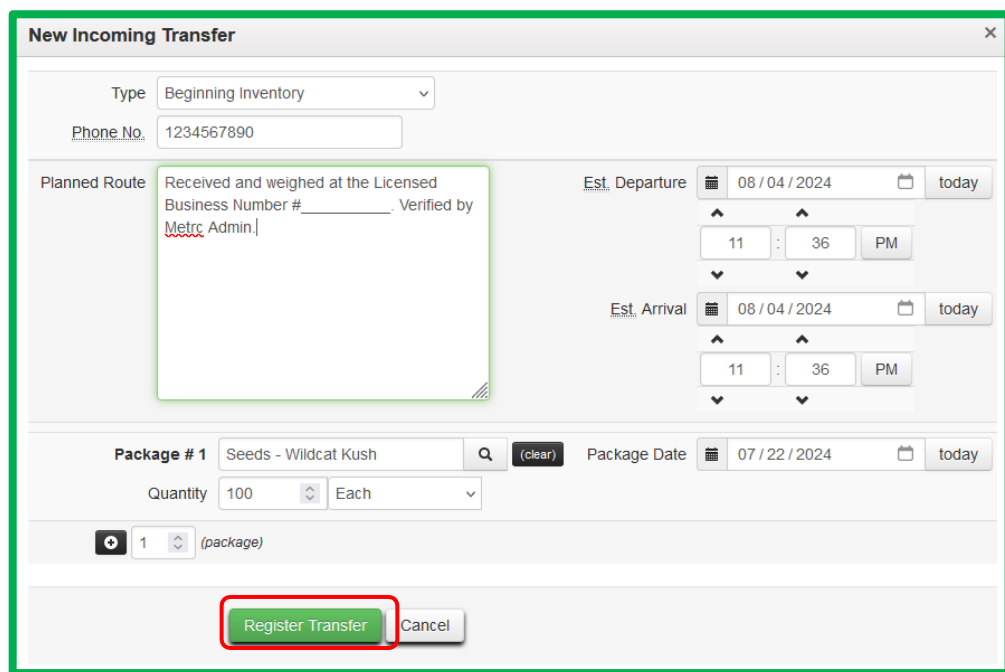


Figure 10: Register Incoming Transfer

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.

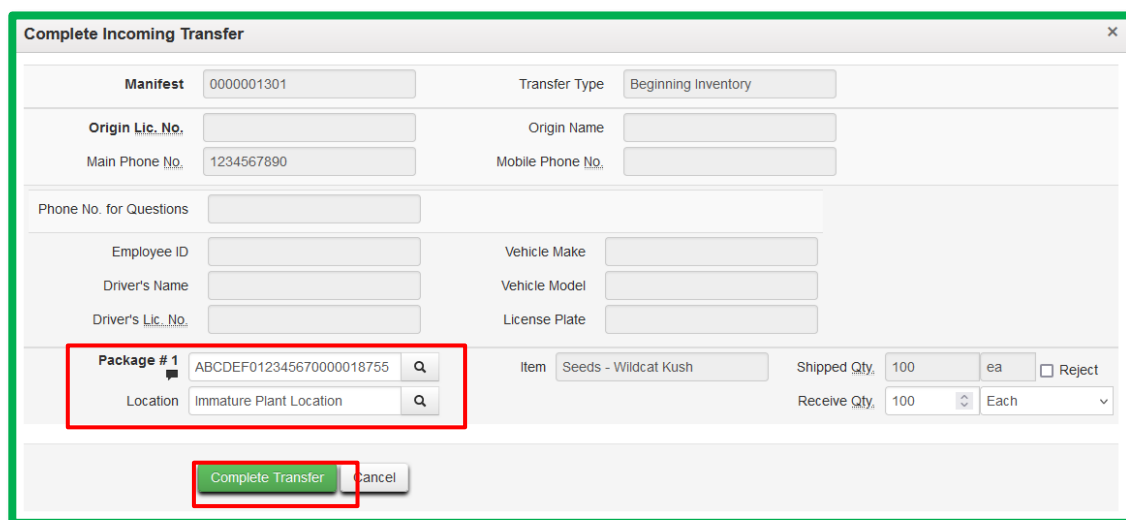
Each Licensed **MUST** have package tags available to complete this step. To complete the pending Incoming External Transfer, select the “Complete” button on the far right of the External Transfer needing to be received in the External Transfers grid - **see Figure 11.**



Manifest	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received	ETRD	ATRD	ETRA	ATRA	
000001301		Beginning Inventory	1	08/04/2024 11:36 pm		08/04/2024 11:36 pm							Complete

Figure 11: 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 immature plants 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 12.**



Manifest: 000001301
Transfer Type: Beginning Inventory

Origin Lic. No.:
Main Phone No.: 1234567890
Origin Name:
Mobile Phone No.:

Phone No. for Questions:
Employee ID:
Driver's Name:
Driver's Lic. No.:
Vehicle Make:
Vehicle Model:
License Plate:

Package #1: ABCDEF012345670000018755
Location: Immature Plant Location
Item: Seeds - Wildcat Kush
Shipped Qty: 100 ea
Receive Qty: 100 Each

Complete Transfer
Cancel

Figure 12: Complete Incoming Transfer

Cultivation Only: Plants Beginning Inventory

When you are ready to bring your plants into Metrc, you will need to contact the Kentucky OMC to request that the timeframe to begin entering plants into Metrc begin. The OMC will enable the facility permission to create plantings with no source and then your plants will be brought into Metrc directly through the Immature Plants area in Metrc using the Create Plantings button – **see Figure 13**.

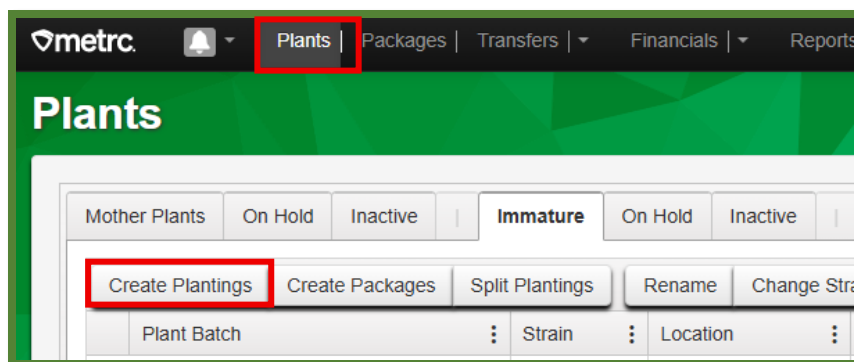
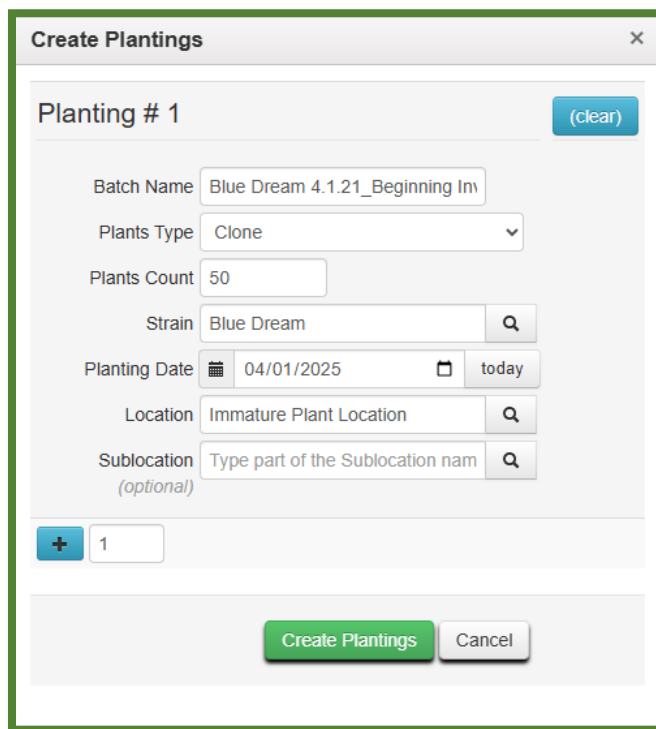


Figure 13: Create Plantings button

In the Create Plantings action window, fill out the fields to create the immature plant batch. A preferred naming convention should be used for the Group Name. 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 clones for beginning inventory where the Group Name is labeled as **Blue Dream 4.1.21_Beginning Inventory** – **see Figure 14**.



The 'Create Plantings' window is a modal form with a title bar and a close button. It contains the following fields and controls:

- Planting # 1**: A text input field with a '(clear)' button to its right.
- Batch Name**: A text input field containing 'Blue Dream 4.1.21_Beginning Im'.
- Plants Type**: A dropdown menu set to 'Clone'.
- Plants Count**: A text input field containing '50'.
- Strain**: A text input field containing 'Blue Dream' with a search icon to its right.
- Planting Date**: A date picker set to '04/01/2025' with a 'today' button to its right.
- Location**: A text input field containing 'Immature Plant Location' with a search icon to its right.
- Sublocation (optional)**: A text input field containing 'Type part of the Sublocation nam' with a search icon to its right.
- Count**: A '+' button followed by a text input field containing '1'.
- Buttons**: 'Create Plantings' (green) and 'Cancel' (grey) buttons at the bottom.

Figure 14: Create Plantings action window

Once the Immature Plant Batch has been created, it can be seen in the Immature tab of the Plants area on the navigational toolbar. For plants that need to be moved to vegetative or flowering, use the Change Growth Phase button to move those plants to the appropriate phase – **see Figure 15.**

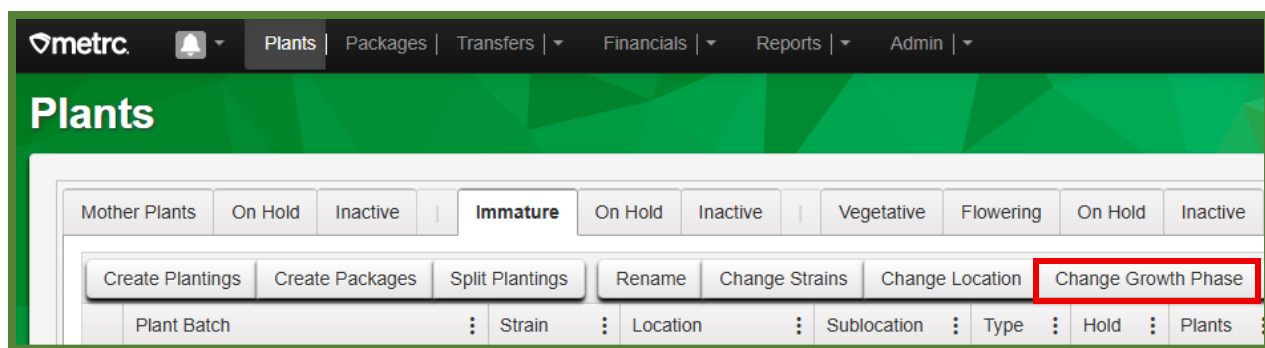


Figure 15: Change Growth Phase button

Fill in the required fields in the Change Growth Phase action window to tag the plants and move them to either vegetative or flowering phases – **see Figure 16.**

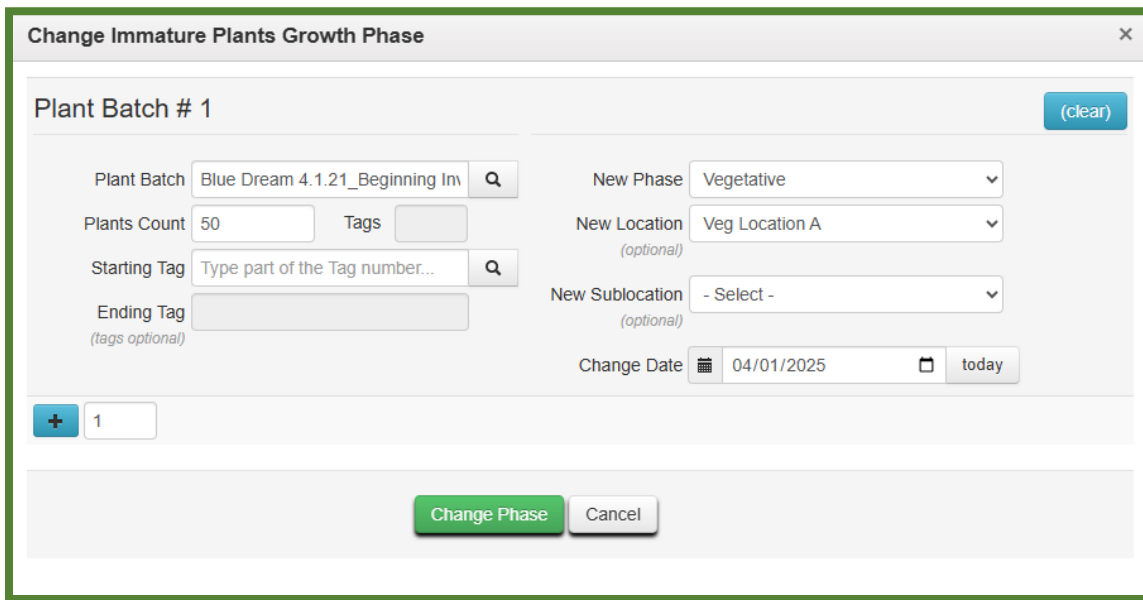


Figure 16: Change Immature Plants Growth Phase action window

Entering New Genetics After Beginning Inventory

Once the beginning inventory timeframe has been closed, you will no longer be able to enter new genetic inventory directly into the Immature Plants area of Metrc. New seeds and clones that are coming from outside of your facility license number will need to be brought in as packages using external transfers, as described earlier in this document.

Once those new genetics have been brought in through external transfers, seeds, clones, and immature plants will need to be planted within the Plants section of Metrc. All seeds or immature plants will need to be planted from the packages. If planning on storing seeds, meaning they would not be planted as a live immature plant yet, then the seeds would be kept in package(s) per the Beginning Inventory section above.

Follow the steps below to plant the seeds or immature plants into Immature Plant Batches.

Once logged into Metrc, go to the Packages area on the navigational toolbar. In the Packages grid, go to the Active tab, select the package of the seeds or immature plants that need to be planted and then click the “Create Plantings” button – **see Figure 17**.

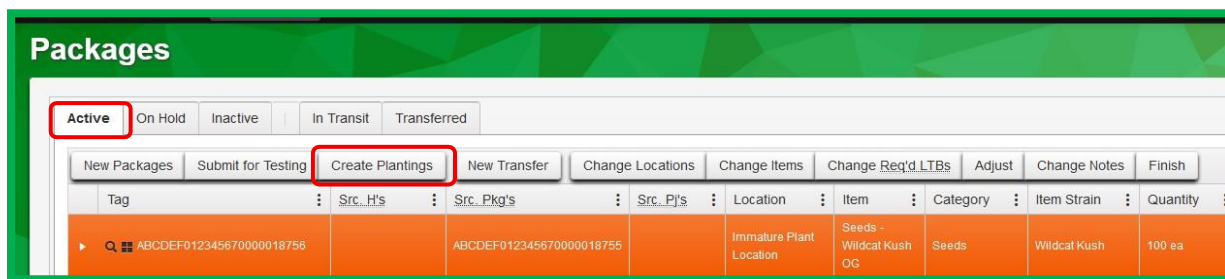


Figure 17: Selecting Package to Create Plantings

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. 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 Wildcat Kush clones where the Group Name is labeled as **Wildcat Kush 10.01.2025**.

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 today's date (the date of entry) for the "Planting Date." Once the information has been entered, click on the "Create Plantings" Button to create the planting(s) – **see Figure 18** below.

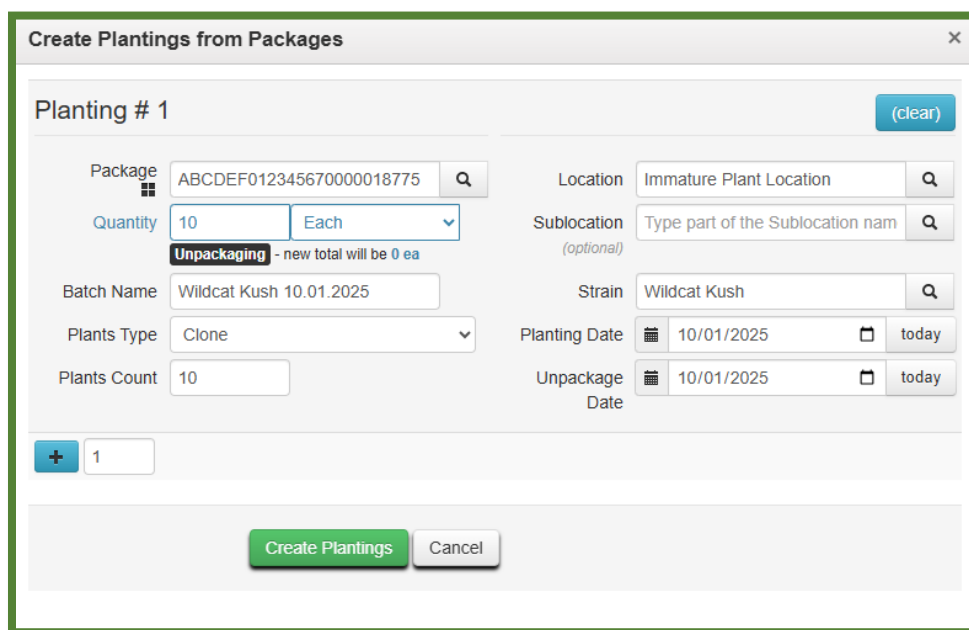


Figure 18: Creating Immature Plantings

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

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 [Support.Metrc.com](https://support.metrc.com), or from the Metrc System, click the Support area dropdown on the navigational toolbar and click support.metrc.com to 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: Metrc Learn was recently redesigned to offer interactive educational opportunities to enhance Metrc system users’ skills and provide various training options based on experience level.

In addition, the learning system is organized into facility-specific programs made up of various courses. To login or register for an account, visit [Metrc Learn](#).

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

Thank you for your continued partnership.