

Bulletin Number: VA_IB_0016	Distribution Date: 10/29/2025	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Transfers Best Practices	
Reason: Providing best practice guidance for licensees when using transfer functionality in Metrc.		

Greetings,

To ensure accuracy and efficiency with Transfers, Metrc and CCA are providing best practice guidance around system functionality to help reduce preventable errors that may result in locked product and increased time required for Metrc Support case processes.

Please read on for additional information.

Outgoing Transfers

When creating a Transfer Manifest in Metrc, it is important to double-check each package that is being added to the Manifest. Some common errors made when creating a transfer manifest include:

- Incorrect package placed on manifest
- Incorrect package quantity
- Incorrect wholesale price
- Incorrect item name or category
- Packages left off manifest

The example manifest below highlights a few key areas from the above list – **see Figure 1**.

1. Destination		Destination Phone No.	
Destination License Number	AU Processor	Date and Approx. Time of Departure	3/13/2024 7:26 AM
Address of Destination		Date and Approx. Time of Arrival	3/13/2024 8:26 AM
		Date/Time Received	
Route to be Traveled Over the river and through the woods; to grandmother's house we go.		Notes: details for extenuating circumstances (e.g., road closure, flat tire, etc.)	
1. Outbound Transporter	AU Secure Transporter	No Layover Scheduled	
Transporter License Number	AU-ST-XXXXXX		
Address of Transporter			
Contact Phone No. for Inquiries: 123-456-12345			
Name of Person Transporting	Dan Campbell	Employee ID of Driver	12345
State Driver's License No.	MI 1	Signature of Person Transporting	
Make, Model, License Plate No.	Ford Lion Mobile DETR01T	Leg of Layover Trip	
1. Package Shipped	Production Batch No.	Item Name	Quantity
1A4FF0100000071000000023 Lab Test: NotRequired		White Widow Moms (Wet Whole Plants (each))	Shp. 3 ea GWT: 2.0000 g
Item Details	Strain: White Widow		

Figure 1: Transfer Manifest

Prior to leaving the originating facility, it is beneficial to ensure:

- Packages are created properly – correct item, quantity, package tag numbers
- The price listed on the transfer, if applicable, is correct
- The correct packages are listed on the transfer and are all physically packed/present
- There are no sales associated with any of the packages on the transfer.

- In the event a package is transferred that is associated with a sale, the ability to edit the sale will not be available.
- Packages with sales should never be transferred out of the facility that completed the sale. If the remaining product in a package needs to be transferred, the remaining quantity should be repackaged onto a new package tag, and the new package should be transferred to the other facility.

Reminder: Once packages are placed on a transfer manifest, they will no longer be visible within the Active Packages grid in Metrc. To view which Packages are in transit (on a manifest) or ones that have previously been transferred, refer to the In Transit or the Transferred tab of the Packages grid – **see Figure 2.**

Difference between In Transit and Transferred tabs:

- **In Transit** - Displays the package(s) that are currently on a transfer manifest and have not been received by the receiving facility.
- **Transferred**: Displays the package(s) that have been transferred out of the facility, received by another licensed facility, and are currently in the inventory of the new facility.

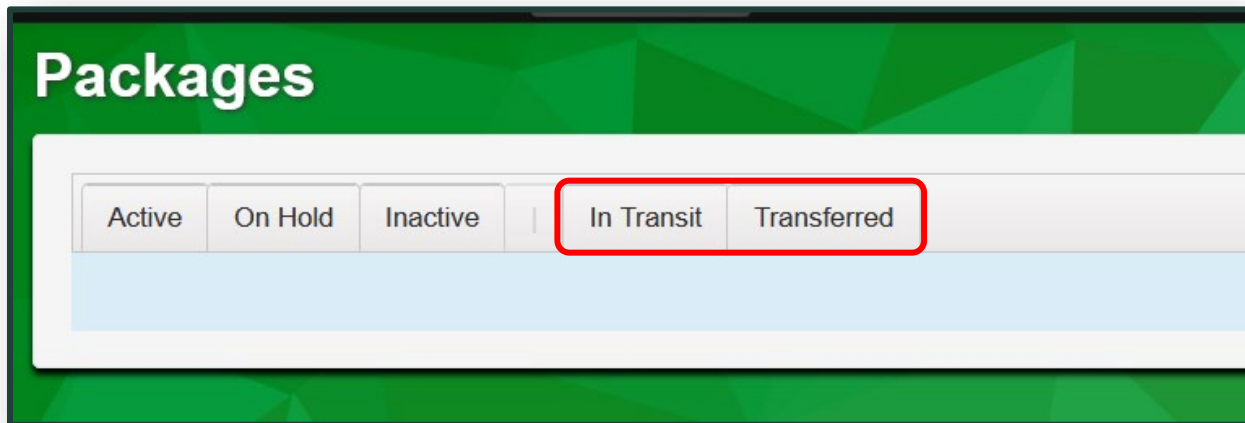


Figure 2: In Transit and Transferred Tab in the Packages Grid

Available Transfer Types

For more information about available transfer types, refer to [Virginia Industry Bulletin #03](#) and [Virginia Industry Bulletin #12](#).

Transfer Templates

Transfer templates are a great option for those who transfer to the same licenses regularly. Here, transfer templates can be created and saved for transfers to a specific license.

To create a Transfer Template, access the Transfers area on the navigational toolbar and select the Templates option from the drop down. Once on the Licensed Transfers Templates grid, select the New Template button – **see Figure 3**.

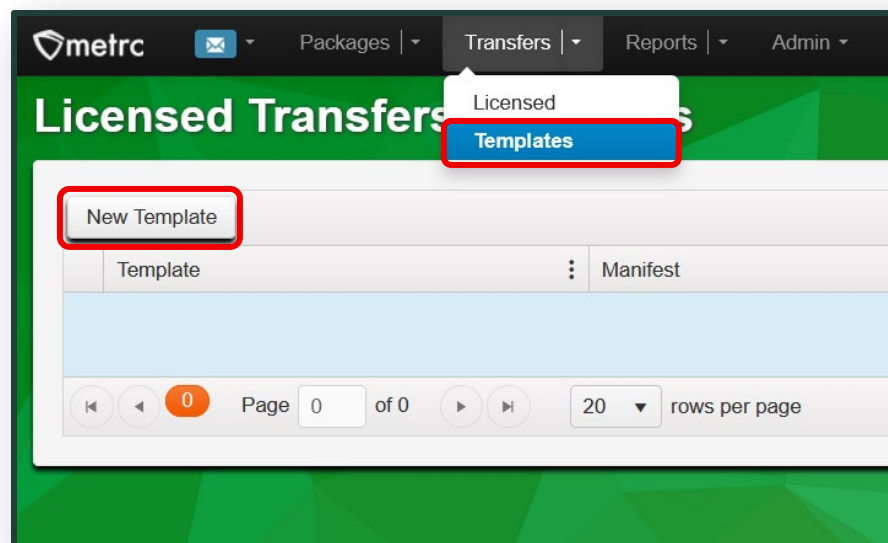


Figure 3: Transfer Templates

The Transfer Template should be completed with the license number, planned route, type of transfer, and driver information filled in, for use when needed. When using a preexisting transfer template, only the packages and ETD (“Estimated Time of Delivery”) and ETA (“Estimated Time of Arrival”) need to be completed. Multiple templates can be created and edited as needed.

Please note: Creating and editing transfer *templates* is available through the Metrc API, but creating a transfer manifest will need to be completed within the Metrc system.

Vehicle and Driver Data

Metrc is constantly working to increase efficiency and ease of use within the system. There are two ways to access functionality:

Ability to save commonly used transporter information

The ability to save commonly used driver and vehicle information is helpful because it then does not need to be manually entered each time a transfer manifest is created.

To add drivers or vehicles, access the Admin area on the navigational toolbar, select the Transporters option from the drop down, then click the Drivers or Vehicles tab – **see Figure 4.**

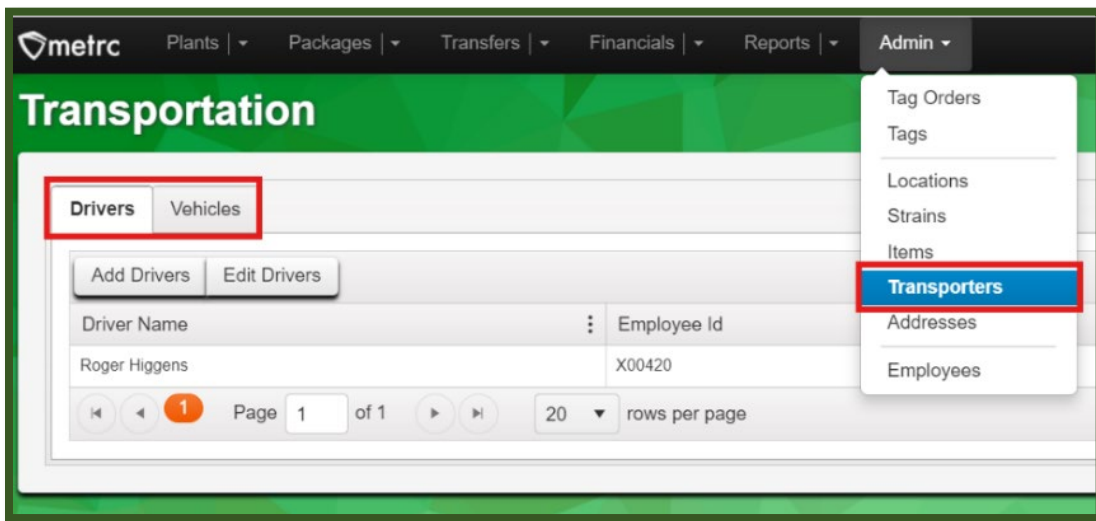
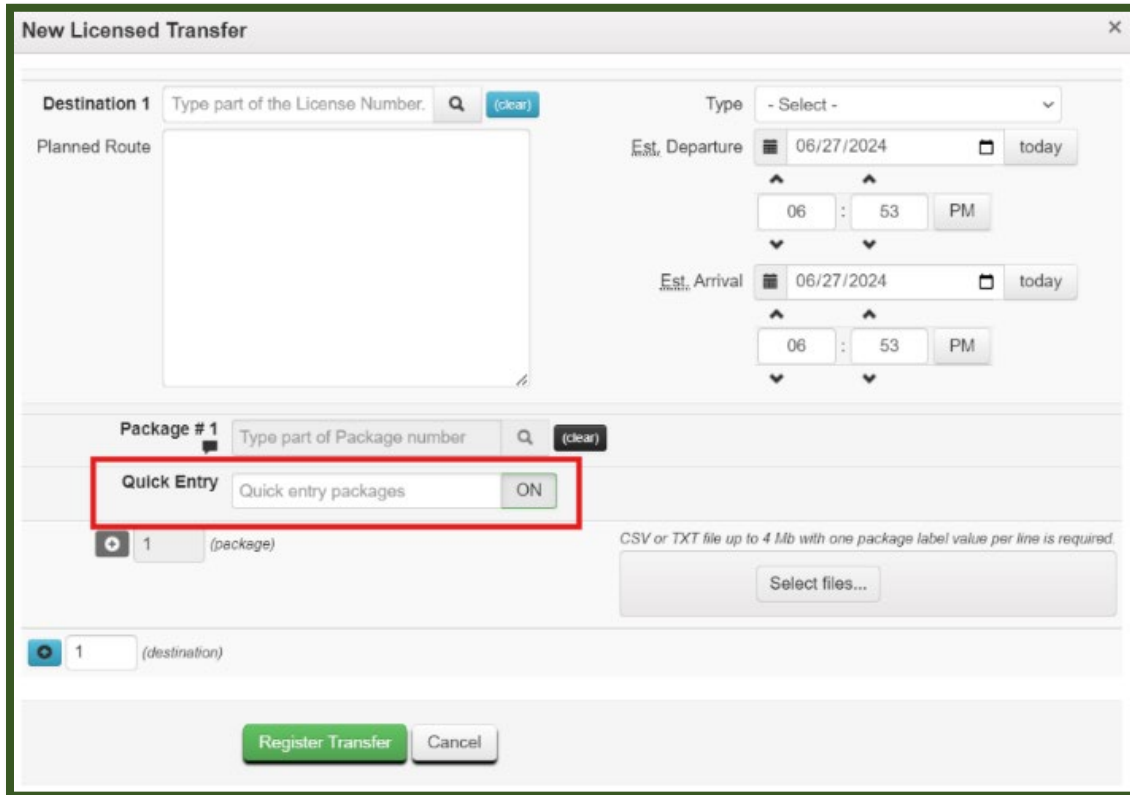


Figure 4: Driver and Vehicle Data Entry

Quick Entry and CSV Upload

Additional efficiencies for creating transfer manifests include use of the Quick Entry and CSV Upload features.

- **Quick Entry** - This feature allows for a barcode scanner to be used to add packages to a manifest in Metrc. When using this feature, be sure that the Quick Entry is toggled “On” for the manifest. If it reads as “Off”, simply click the “Off” button so that it toggles to “On” – **see Figure 5**.



The screenshot shows the 'New Licensed Transfer' form. The 'Quick Entry' toggle is highlighted with a red box and is currently set to 'ON'. The form includes fields for 'Destination 1', 'Planned Route', 'Type', 'Est. Departure', 'Est. Arrival', 'Package # 1', and a 'Select files...' button for CSV or TXT upload. The 'Quick Entry' toggle is located below the 'Package # 1' field.

Figure 5: Quick Entry functionality

- **CSV Upload** - This functionality offers the ability to upload a simple CSV file to add packages to the manifest – **see Figure 6**.

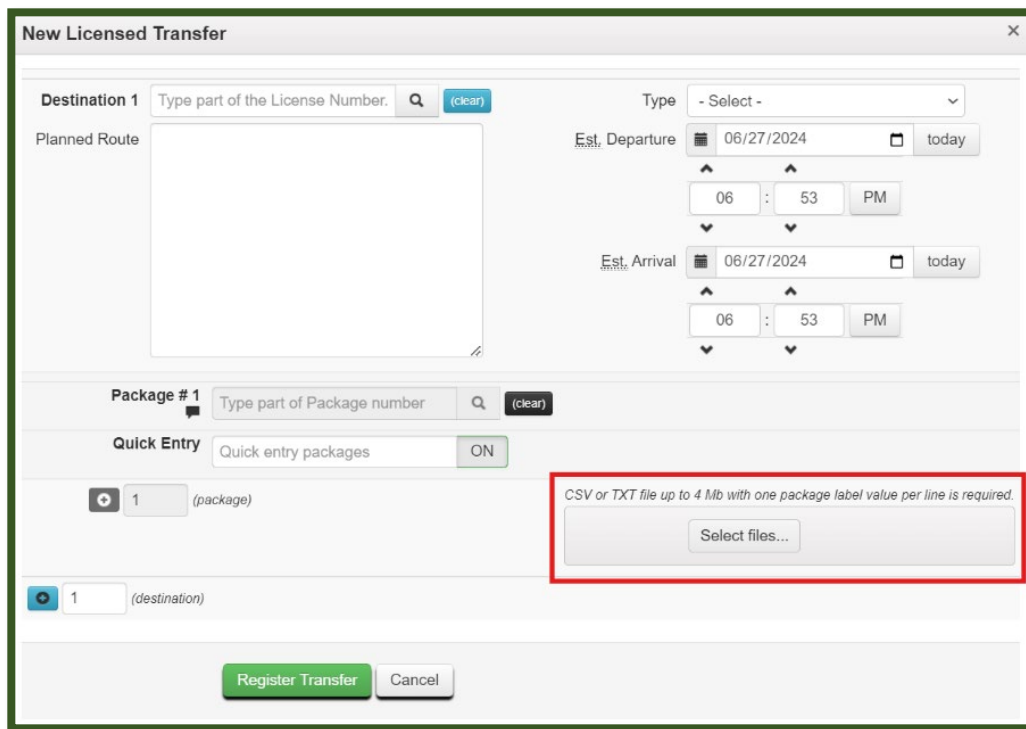


Figure 6: CSV Upload to add packages to a transfer manifest

Please note: Taking this action will only add the package tag IDs. If wholesale pricing needs to be added, that must still be done manually within the transfer manifest creation window for each package.

Transfers Cannot Go to Multiple Locations

Transfers should only go between two locations only for proper documentation in Metrc. If you have a workflow that requires the same driver and vehicle to drop off and pick up items at multiple facilities, each leg of the transfer must have its own unique manifest.

Using Transfer Templates (see above) in conjunction with Quick Entry and CSV Upload (see above) can make the process of setting up multiple transfers more efficient.

EXAMPLE:

Processor A is fulfilling wholesale orders to be delivered to two licensed cannabis facilities: Processor B and Dispensary Z. The driver loads their truck with packages for two deliveries: items for Processor B (first stop), and items for Dispensary Z (second stop).

Processor A sets up an “Unaffiliated Transfer” to Processor B including only the packages intended for Processor B. Use the Estimated Arrival Time field to indicate when the driver will arrive at the first stop (Processor B).

Processor A sets up an “Unaffiliated Transfer” to Dispensary Z including only the packages intended for Dispensary Z. The Estimated Arrival Time for this transfer should factor in travel time for the first stop to Processor B.

Processor A's driver delivers the unaffiliated transfer to Processor B, who receives the manifest in Metrc while Processor A's driver is still there.

- Processor B can accept all packages or reject any packages as appropriate (see below for guidance on rejecting a package).
- Rejected packages are updated on the transfer manifest for documentation of return to the origin facility (Processor A). Processor A must receive the rejected items back into their own inventory before it is possible to transfer those items again.

Processor A's driver continues to Dispensary Z to complete the delivery of the second manifest.

- Dispensary Z can accept all packages or reject any packages as appropriate (see below for guidance on rejecting a package).

Processor A returns to the origin facility with any rejected packages. Completed transfers are displayed in the “Inactive” tab of the Licensed Transfers screen.

NOTE: Processor A may pick up a transfer from Processor B at the same time it is delivering a transfer, however each transfer must have its own manifest. Processor A may act as transporter for a transfer from Processor B to Dispensary Z, if designated by Processor B as the transporter for that transfer.

ALERT: Each licensed transfer between cannabis facilities should have its own transfer manifest. Do not edit an existing transfer by adding more packages or changing destination.

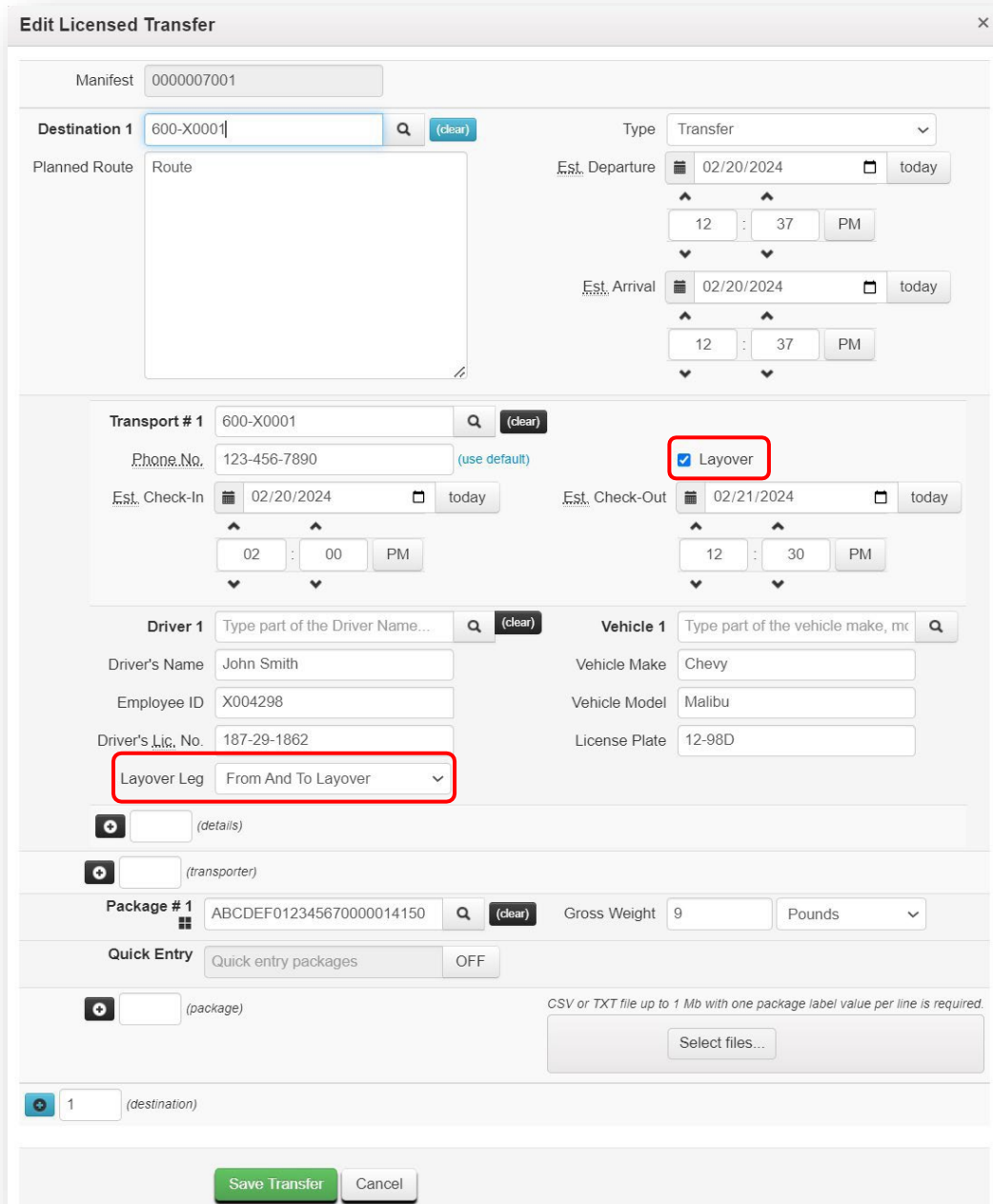
Transfer with Layover

If a transfer requires long drive time, the origin facility may choose to include a layover in the transfer manifest to document an overnight stay.

Important tips:

- Layover legs must occur on the premises of a Licensed Cannabis Business.
- If a driver is transporting cannabis to multiple destinations (i.e., transporting cannabis from a single cultivation to multiple stores), the destinations are *NOT* considered layover legs.
- When selecting “To Layover,” the system will require a “From Layover” leg. The plus sign can be used to add additional legs.

The Layover Leg field within the New or Edit Licensed Transfer action windows will only display once the Layover checkbox is marked – **see Figure 7**.



The screenshot shows the 'Edit Licensed Transfer' window. The 'Layover' checkbox is checked and highlighted with a red box. Below it, the 'Layover Leg' dropdown menu is also highlighted with a red box and shows the value 'From And To Layover'.

Manifest: 0000007001

Destination 1: 600-X0001

Type: Transfer

Planned Route: Route

Est. Departure: 02/20/2024 12:37 PM

Est. Arrival: 02/20/2024 12:37 PM

Transport # 1: 600-X0001

Phone No.: 123-456-7890 (use default)

Est. Check-In: 02/20/2024 02:00 PM

Est. Check-Out: 02/21/2024 12:30 PM

Driver 1: Type part of the Driver Name... (clear)

Driver's Name: John Smith

Employee ID: X004298

Driver's Lic. No.: 187-29-1862

Vehicle 1: Type part of the vehicle make, mc (clear)

Vehicle Make: Chevy

Vehicle Model: Malibu

License Plate: 12-98D

Layover Leg: From And To Layover

Package # 1: ABCDEF012345670000014150 (clear)

Gross Weight: 9 Pounds

Quick Entry: Quick entry packages OFF

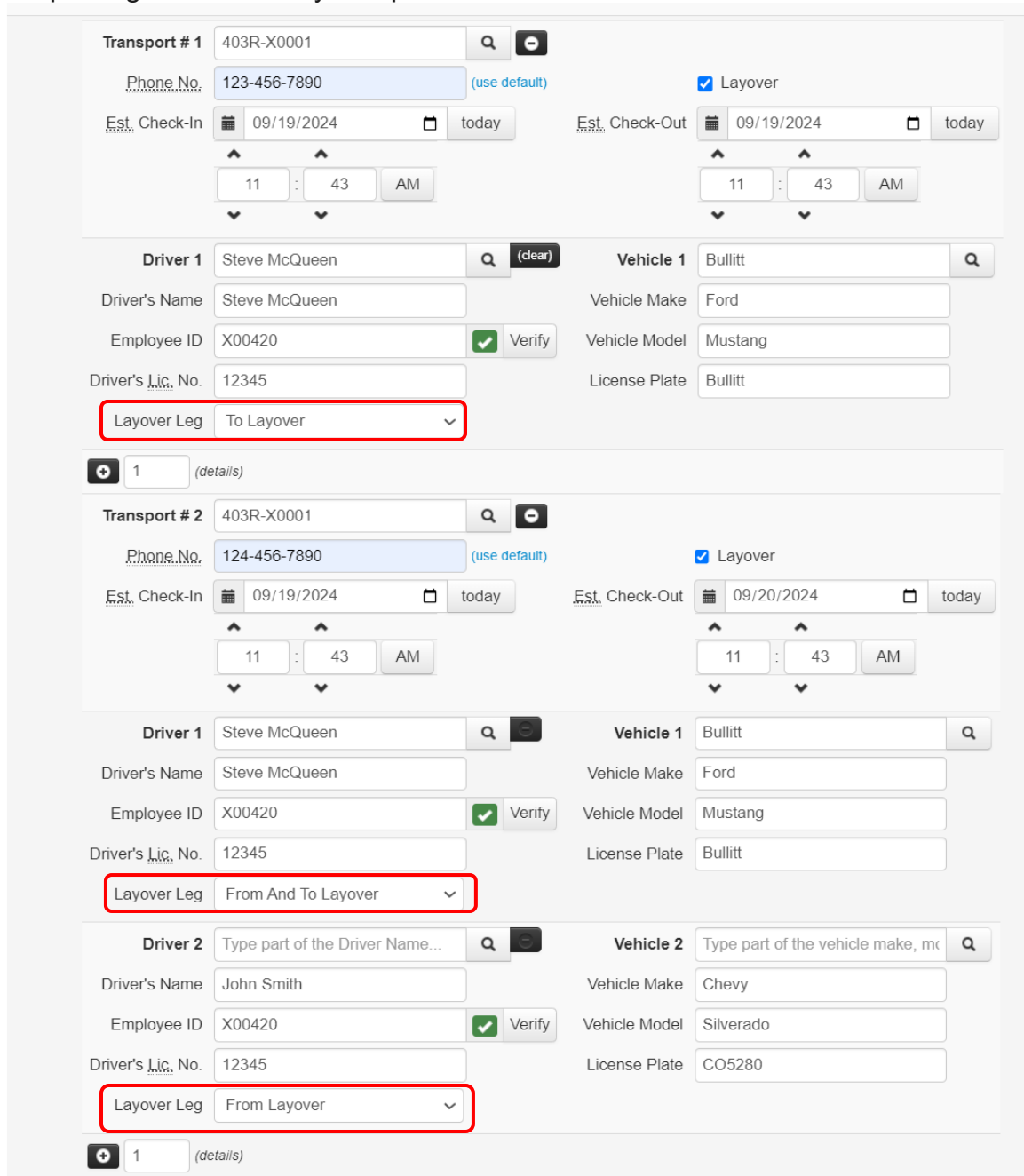
Select files...

Save Transfer Cancel

Figure 7: Layover checkbox and Layover Leg field

Three options will be available to be selected for the Layover Leg field – **see Figure 8.**

- **From And to Layover** – This should be selected if the same driver will be completing the entire trip, from the originating license to the destination license.
- **To Layover** – This should be selected if the driver will be transporting the package(s) from the origin license to the layover point.
- **From Layover** – This should be selected if the driver will be transporting the packages from the layover point to the destination license.



Transport # 1 403R-X0001

Phone No. 123-456-7890 (use default) ☒ Layover

Est. Check-In 09/19/2024 Est. Check-Out 09/19/2024

11 : 43 AM

Driver 1 Steve McQueen

Driver's Name Steve McQueen

Employee ID X00420 ☒ Verify

Driver's Lic. No. 12345

Layover Leg To Layover

Vehicle 1 Bullitt

Vehicle Make Ford

Vehicle Model Mustang

License Plate Bullitt

Transport # 2 403R-X0001

Phone No. 124-456-7890 (use default) ☒ Layover

Est. Check-In 09/19/2024 Est. Check-Out 09/20/2024

11 : 43 AM

Driver 1 Steve McQueen

Driver's Name Steve McQueen

Employee ID X00420 ☒ Verify

Driver's Lic. No. 12345

Layover Leg From And To Layover

Vehicle 1 Bullitt

Vehicle Make Ford

Vehicle Model Mustang

License Plate Bullitt

Transport # 3

Phone No. (use default)

Est. Check-In Est. Check-Out

Driver 2 Type part of the Driver Name...

Driver's Name John Smith

Employee ID X00420 ☒ Verify

Driver's Lic. No. 12345

Layover Leg From Layover

Vehicle 2 Type part of the vehicle make, mo...

Vehicle Make Chevy

Vehicle Model Silverado

License Plate CO5280

Figure 8: Layover Leg options

The Layover Leg field is now included on the Metrc transportation manifest and in the Transporter Details tab when using the drill down arrow in the manifest details tab – see Figure 9.

ALCOHOL & MARIJUANA CONTROL OFFICE MARIJUANA TRANSPORTATION MANIFEST			
All sales transactions are to be completed prior to transportation of any MARIJUANA. The receiving entity may reject product delivered, but amount delivered must be limited to amount agreed upon in prior sales transaction.			
Manifest No.	000007001	Date Created	2/20/2024 11:11 AM
Originating Entity	OR LOFTY ESTABLISHMENT, LLC	For Agency Use Only	
Originating License Number	200-X0001		
Address of Originating Entity	9079 SE McLoughlin Blvd. Portland, OR 97222-7355 County: Clackamas		
Phone No. of Originating Entity			
1. Destination	OR LARGER THAN SALES, LLC	Destination Phone No.	
Destination License Number	600-X0001	Date and Approx. Time of Departure	2/20/2024 12:37 PM
Address of Destination	9079 SE McLoughlin Blvd. Portland, OR 97222-7355 County: Clackamas		
		Date and Approx. Time of Arrival	2/20/2024 12:37 PM
		Date/Time Received	
Route to be Traveled	Notes: details for extenuating circumstances (e.g., road closure, flat tire, etc.)		
Route			
1. Outbound Transporter	OR LARGER THAN SALES, LLC	Layover Schedule	
Transporter License Number	600-X0001	Date and Approx. Time of Check-In	2/20/2024 2:00 PM
Address of Transporter	9079 SE McLoughlin Blvd. Portland, OR 97222-7355 County: Clackamas		
		Date and Approx. Time of Check-Out	2/21/2024 12:30 PM
Contact Phone No. for Inquiries:	123-456-7890	Handler Permit No. of Driver	X004298
Name of Person Transporting	John Smith	Signature of Person Transporting	
State Driver's License No.	187-29-1862	Leg of Layover Trip	From And To Layover
Make, Model, License Plate No.	Chevy Malibu 12-98D		
1. Package Shipped	Production Batch No.	Item Name	Quantity
ABCDEF012345670000014150 Lab Test: TestPassed	14150	Joe's Peanut Butter Cookies (Edible)	Shp: 117.0000 ea GWT: 9.0000 lb
Item Details			
Source Package(s)	ABCDEF012345670000014132		
Source Production Batch			
PRODUCT REJECTION (if only a portion of shipment is rejected, circle that portion above)			
Name of Person Receiving or Rejecting Product			
I confirm that the contents of this shipment match weight records entered above, and I agree to take custody of those portions of this shipment not circled above. Those portions circled were returned to the individual delivering this shipment.			
Signature	Date		
Signature of individual taking receipt of rejected portion of this shipment			

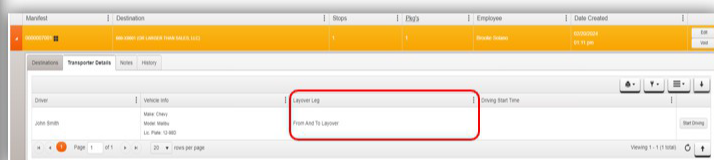


Figure 9: Layover Leg Field on Transfer Manifest and in Transporter Details tab

A driver must be assigned for each transfer layover leg, or a warning message will appear – see Figure 10.

The Transfer has been marked for Layover, a Driver has been marked for a portion of the layover please ensure both parts of the Layover have at least one Driver selected.

Figure 10: Metrc warning to assign a driver

Receiving Transfers

When accepting a transfer in Metrc, some commonly observed errors include:

- Issues relating to the originating manifest that went unnoticed or ignored.
- Receiving different quantities than what was shipped.
- Receiving transfers in Metrc when intending to reject the transfer.

To prevent these types of errors, the following is recommended:

- All packages should be thoroughly inspected and weighed/counted prior to the transport driver departing the facility.
- If possible, leverage another employee to dually verify accuracy prior to accepting transfers.
- Always receive the transfer in Metrc prior to the transporter leaving the facility. This will ensure that, should any issues be found, the packages can be rejected both physically and in Metrc without delay.
- As soon as a new transfer manifest is generated in Metrc, that manifest is visible to the destination license.
 - It is strongly recommended that the destination license view this manifest data in Metrc and confirm that everything looks correct.
 - **Please note:** This does not remove the need to check the physical product upon arrival, however, it does allow for some mistakes to be corrected prior to shipping, such as testing errors, item errors, or electronic quantity issues.
- Ensure accuracy of Lab Testing – **see Figures 11 and 12 below.**
 - When viewing the “Lab Test Batches” tab within the package details, please check that only lab test batches appropriate for that package’s item category are present. For example, a package of Concentrates should not have test results data for Raw Plant Material. If the Test Batch data is not correct, the package should be rejected so that it can be returned physically to the shipper and in Metrc so it can be corrected by the sending facility.

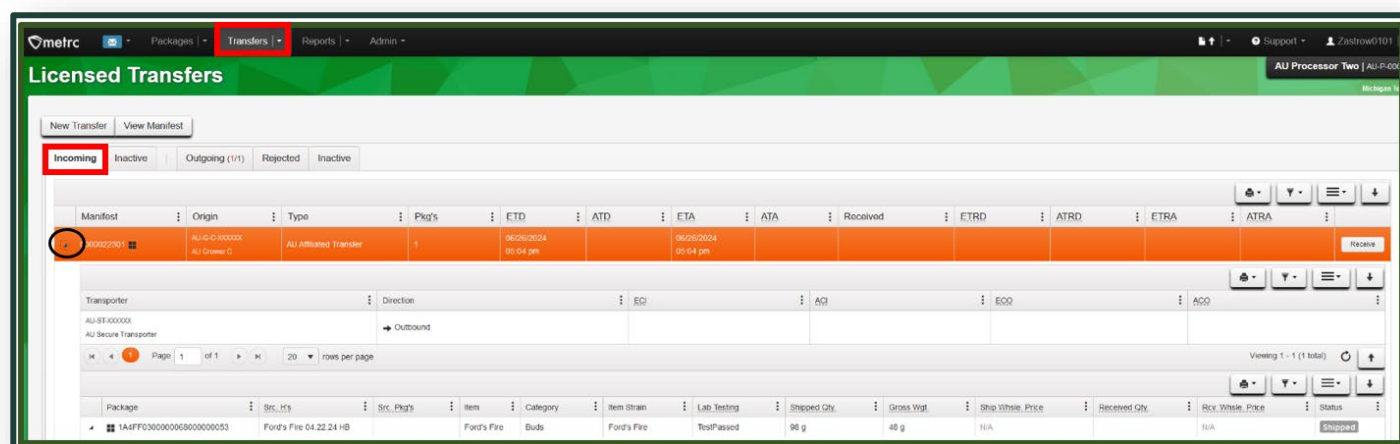


Figure 11: Navigate to a Specific Package on an Incoming Transfer Manifest

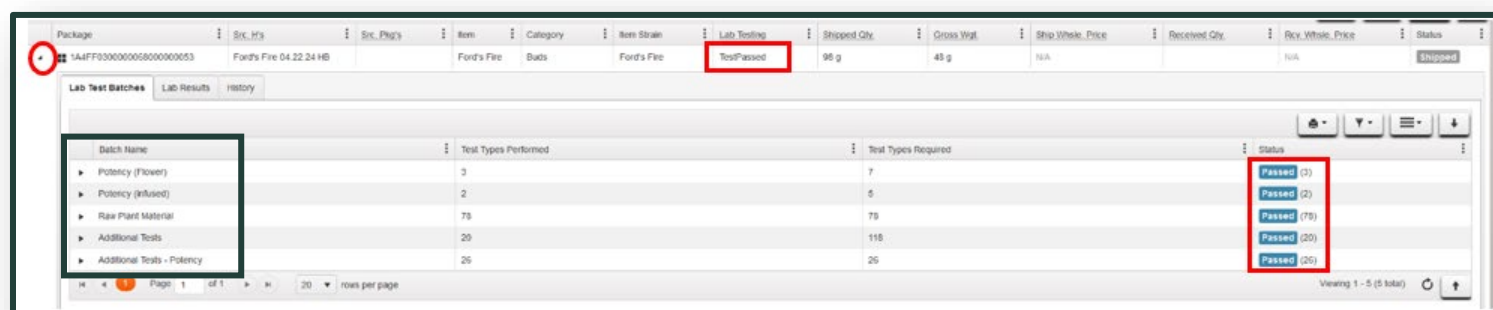
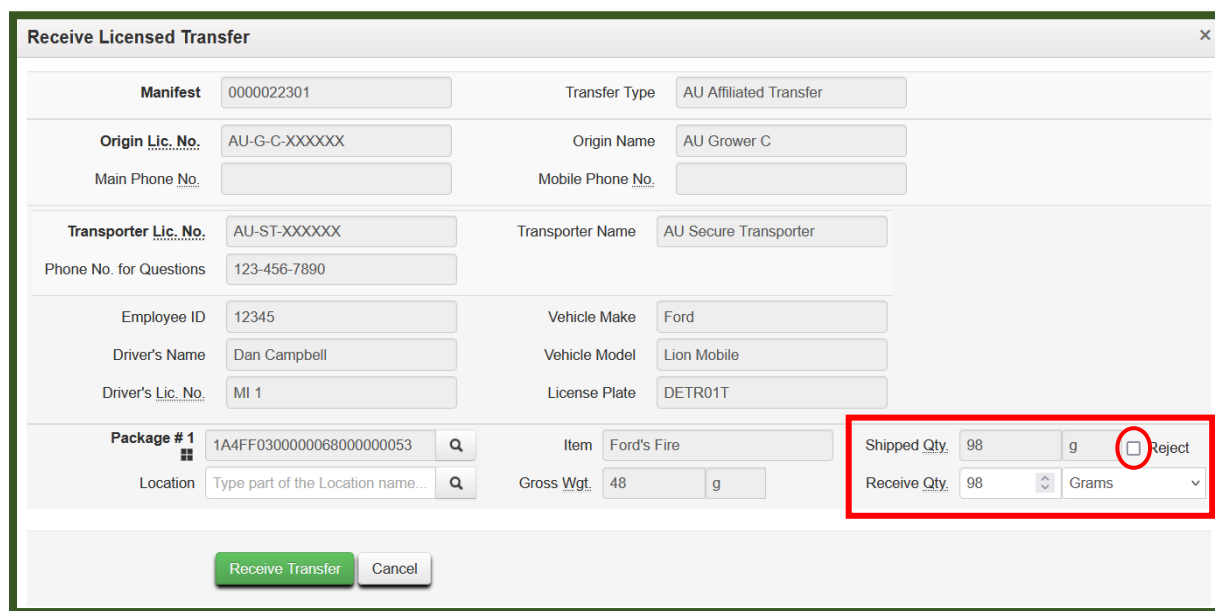


Figure 12: View Test Results of a Package on the Incoming Transfer Manifest

Packages should not be received at a quantity different than was shipped. If there is a difference in quantity of a package, that package should be rejected so that it can be returned, corrected, and reshipped. When a package is received with a quantity different than when it was shipped, that additional product does not go back to the origin license's inventory.

When rejecting a transfer, remember to check the "Reject" box to the right of the Shipped Qty. package being rejected before clicking the Receive button on the transfer – **see Figure 13**. There is no way to undo the accidental acceptance of a package.



Receive Licensed Transfer

Manifest: 0000022301 Transfer Type: AU Affiliated Transfer

Origin Lic. No.: AU-G-C-XXXXXX Origin Name: AU Grower C

Main Phone No.: Mobile Phone No.:

Transporter Lic. No.: AU-ST-XXXXXX Transporter Name: AU Secure Transporter

Phone No. for Questions: 123-456-7890

Employee ID: 12345 Vehicle Make: Ford

Driver's Name: Dan Campbell Vehicle Model: Lion Mobile

Driver's Lic. No.: MI 1 License Plate: DETR01T

Package # 1: 1A4FF03000000680000000053 Item: Ford's Fire

Location: Type part of the Location name... Gross Wgt.: 48 g

Shipped Qty: 98 g ☐ Reject

Receive Qty: 98 Grams

Receive Transfer Cancel

Figure 13: Reject checkbox and Received Quantity field

Once a Transfer Manifest is received in Metrc, the PDF of the transfer (found by clicking the View Manifest button within the incoming and/or outgoing Transfers grids in Metrc) will update to a status of accepted packages in green or rejected packages in pink – see Figures 14 and 15.

1. Package Accepted	Production Batch No.	Item Name	Quantity
1A4FF03000000680000000053 Lab Test: TestPassed		Ford's Fire (Buds)	Shp: 98 g Rcv: 98.0000 g GWT: 48.0000 g
Item Details	Strain: Ford's Fire		
Source Harvest	Ford's Fire 04.22.24 HB		

Figure 14: Received package on PDF copy of manifest

1. Package Rejected	Production Batch No.	Item Name	Quantity
1A4FF01000000710000000023 Lab Test: NotRequired		White Widow Moms (Wet Whole Plants (each))	Shp: 3 ea GWT: 2.0000 g
Item Details	Strain: White Widow		
Reject Reason: Tampered Package		Rejection Note: No thank you	

Figure 15: Rejected package on PDF copy of manifest

Metrc resources

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

Contact Metrc Support

By navigating to [Support.Metr.com](https://support.metr.com), or from the Metrc System, click Support on the navigational toolbar and click support.metr.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 is designed to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Accessing the new [Metrc Learn](#) LMS is simple through multiple convenient locations:

From within the Metrc system

Navigate to the Support area on the navigational toolbar and select “Sign up for Training” to register option from the dropdown.

From the Metrc website

Navigate to your [state’s partner page](#) and scroll down to the “Metrc’s Training Resources” section to find the link.

Also, save the link – learn.metr.com – as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

Thank you for your continued partnership.