

Bulletin Number: NY_IB_0006	Distribution Date: 1/14/2025	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: How to Submit a Testing Sample - Step by Step Guidance	
Reason: Metrc provides guidance on how to create lab test samples based on the item category.		

Greetings,

Metrc, in collaboration with the New York Office of Cannabis Management (OCM), is pleased to provide step by step instructions on how to create lab test samples based on the item category in Metrc.

We will be covering the following information in this guidance:

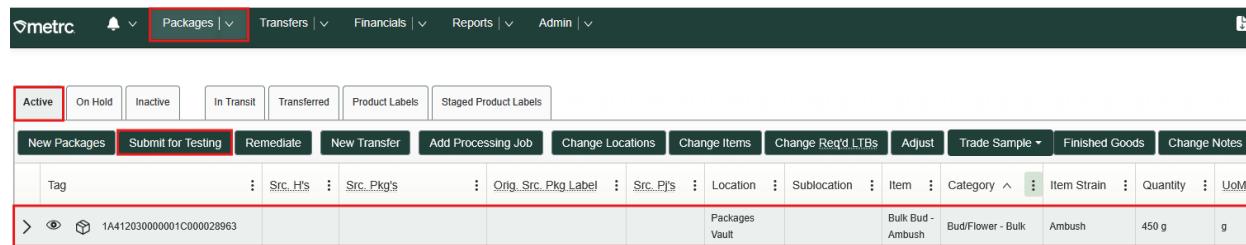
- [Creating a Testing Sample for a Bulk Item Category Ready for Final Form Packaging](#)
- [Creating a Testing Sample for Final Form - Each Item Categories](#)
- [Creating a Transfer for a Testing Sample](#)

Please read on for additional information.

Creating a Testing Sample for a Bulk Item Category Ready for Final Form Packaging

This process will be used when a product is in its bulk item category type within Metric, but is in ready-to-consume final product form physically. Ready-to-consume final product form is a cannabis product that requires no further processing and ready for final packaging.

- Go to **Packages** area on the navigational toolbar and select the **Active** tab.
- Select the **Bulk** source package to be tested in the Packages grid
- Select the **Submit for Testing** button - see **Image 1**.



Packages											
Active		On Hold		Inactive		In Transit		Transferred		Product Labels	
New Packages		Submit for Testing		Remediate		New Transfer		Add Processing Job		Change Locations	
Tag	Src...H's	Src...Pkg's	Orig...Pkg Label	Src...Pj's	Location	Sublocation	Item	Category	Item Strain	Quantity	UoM
> 1A412030000001C000028963					Packages Vault		Bulk Bud - Ambush	Bud/Flower - Bulk	Ambush	450 g	g

Image 1: Selecting the source package and submitting for testing

- In the **Submit for Testing** action window, fill in all the required fields including entering the new Package UID for the testing sample and the location where the sample is stored in your facility. **see Image 2**.

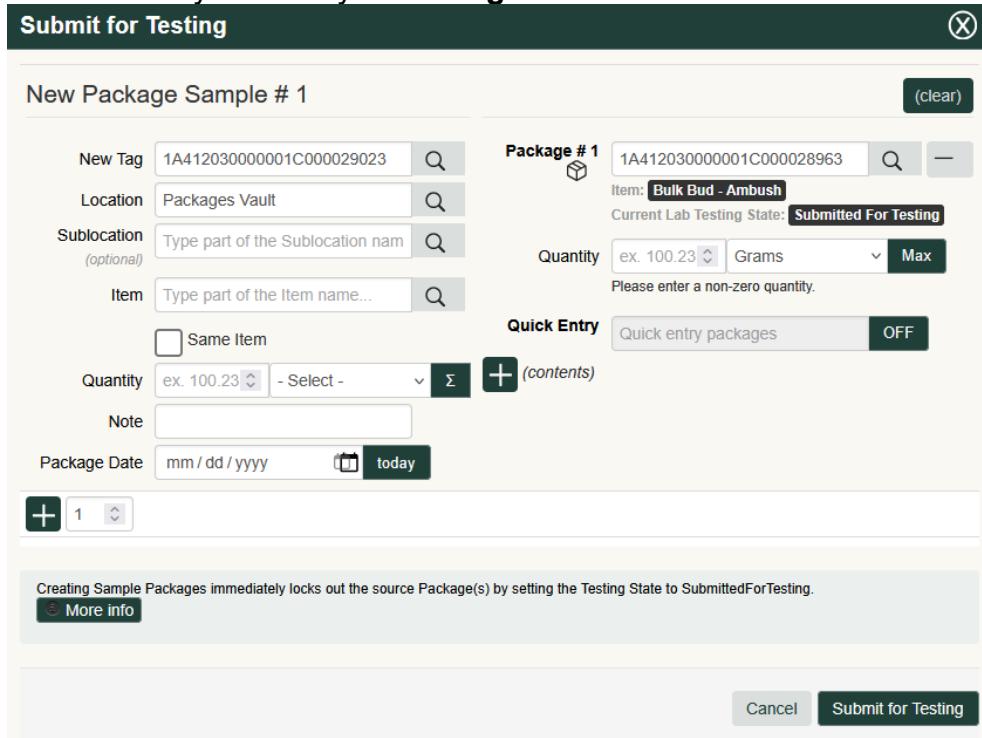


Image 2: Submit for testing action window

Metrc Support Bulletin



- For the **Item** field, you will select the **Final Form – Each** product category that the **item will be packaged into after testing is completed**. You can also select the magnifying glass icon to pull up a list of all your items, and manually find and select it. In this example the item is a 3.5g Ambush Flower - see Image 3 & 4.

Submit for Testing

New Package Sample # 1

(clear)

New Tag	1A412030000001C000029023	<input type="button" value=""/>
Location	Packages Vault	<input type="button" value=""/>
Sublocation (optional)	Type part of the Sublocation name	<input type="button" value=""/>
Item	ambush	<input type="button" value=""/>
Quantity	ex. 100.23	Grams
Note	Please enter a non-zero quantity.	
Package Date	mm / dd / yyyy	<input type="button" value=""/> today
<input type="button" value=""/> 1 <input type="button" value=""/>		
<p>Creating Sample Packages immediately locks out the source Package(s) by setting the Testing State to SubmittedForTesting.</p> <input type="button" value=""/> More Info		
<input type="button" value=""/> Cancel		<input type="button" value=""/> Submit for Testing

Image 3: Selecting the final form item type by starting to type in the name

Submit for Testing
Remediate
New Transfer
Add

Src. Ifs
Src. Pkg's

New Package Sample # 1
(clear)

New Tag
1A412030000001C000029022
Search

Package # 1
1A412030000001C000028963
Search

Location
Packages Vault
Search

Quantity
UoM
P.B. No.
Src. P.B.
LT Status

0 g
g
SubmittedFor

Select
Cancel
Select

Add Item
Print
Export

Item
Category
Type
Quantity Type
Default LTS
UoM
Strain
CBD%
CBD
CBD.O.
CBDAs%
CBOA
CBDAs.D.
THC%
THC
THC.D.
THCAs%
THCA
THCAs.D.

1g Vape Cart - Each
Vape Cartridge
Concentrate
CountBased
NotSubmitted
Each

3.5g Ambush Flower
Bud/Flower - Each
Buds
CountBased
NotSubmitted
Each
Ambush

Ambush 7g
Bud/Flower - Each
Buds
CountBased
NotSubmitted
Each
Ambush

Ambush Raw Pre-Rolls
Raw Pre-Roll - Each
Shake/Trim
CountBased
NotSubmitted
Each
Ambush

Bulk Bud Ambush
Bud/Flower - Bulk
Buds
WeightBased
NotSubmitted
Grams
Ambush

1
2
3
4
Page 1 of 4
Next
5
6

Viewing 1 - 5 (18 total)

Image 4: Selecting the final form flower item type from the menu of items

- Please note: If you have a source package of bulk product that will be packaged into multiple different final form items (i.e - 1g bud/flower - each, 3.5g bud/flower - each, 7g bud/flower - each) you will need to repackage the package into separate packages that you are allocating to the production of

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each of the final form items before you submit test samples from each of the packages for the final form items - see Image 5.

The screenshot displays three separate windows for creating new packages, labeled 'New Package #1', 'New Package #2', and 'New Package #3'. Each window has a 'New Tag' field (e.g., 1A412030000001C000029039, 1A412030000001C000029040, 1A412030000001C000029041), a 'Location' field (Metrc Room), and a 'Sublocation' field (Sublocation name). The 'Quantity' field is set to 'ex. 100' and 'Each'. A red box highlights the 'Note' field in each window, which contains the text 'This will be used for 1g Ambush', '3.5g Ambush', and '7g Ambush' respectively. The 'Package Date' is set to '01/14/2026'. The 'Current Lab Testing State' is 'Submitted For Testing'. The 'Quantity' is set to 10 Grams. The 'Quick Entry' button is set to 'OFF'. The 'Create Packages' button is at the bottom right of the third window.

Image 5: Splitting Source Package for Final Packaged Item

- After selecting the final form item, use the right side of the **Submit for Testing** action window to deduct the required amount from the source package (Package #1) and add it to the new testing sample package.
- Next, select the correct final form lab test batch that is required. In this example, AU Raw Plant Material – Final Form is selected - **see Image 6**. Then select the Submit for Testing button to complete the creation of the new test sample.

Metric Support Bulletin



Submit for Testing

New Package Sample # 1

(clear)

New Tag	1A412030000001C000029042	<input type="button" value="Q"/>
Location	Metric Room	<input type="button" value="Q"/>
Sublocation (optional)	Type part of the Sublocation name	<input type="button" value="Q"/>
Item	3.5G Ambush flower	<input type="button" value="Q"/>
Quantity	1	Each
Note	<input type="text"/>	
Package Date	01/16/2026	<input type="button" value="today"/>
Expiration Date	12/04/2026	<input type="button" value="✓"/>
Sell-By Date	12/04/2026	<input type="button" value="✓"/>
Required Testing	<input checked="" type="checkbox"/> AU Raw Plant Material - Final Form <input type="checkbox"/> Medical Raw Plant Material - Final Form <input type="checkbox"/> R&D Testing - Aspergillus <input type="checkbox"/> R&D Testing - Metals <input type="checkbox"/> R&D Testing - Microbials - Salmonella <input type="checkbox"/> R&D Testing - Microbials - STEC <input type="checkbox"/> R&D Testing - Microbials - Total Viable Aerobic Bacteria <input type="checkbox"/> R&D Testing - Microbials - Total Yeast and Mold <input type="checkbox"/> R&D Testing - Moisture Content <input type="checkbox"/> R&D Testing - Mycotoxins <input type="checkbox"/> R&D Testing - Pesticides	

Package # 1

1A412030000001C000028963

Item: Bulk Bud - Ambush

Current Lab Testing State: Submitted For Testing

Quantity: 3.5 Grams Max

Sampling - new total will be 446.5 g

Source Package - Weight 450 g

Quick Entry: Quick entry packages OFF

+ (contents)

Image 6: Inputting Testing sample information

Important : A testing sample package can be identified by the graduated cylinder icon - see Image 7.

		111325		Vault		Flower			
>	<input type="checkbox"/>	1A412030000001C000029020	<input type="button" value="Q"/>	1A412030000001C000028963		Metric Room	3.5G Ambush flower	Bud/Flower - Each	Ambush
>	<input type="checkbox"/>	1A412030000001C000029015	<input type="button" value="Q"/>	1A412030000001C000028971	1A412030000001C000028971	Metric Room	Ambush 7g	Bud/Flower - Each	Ambush

Image 7: Testing sample icon

Important: If multiple testing samples are created, the testing status will remain TestingInProgress until all test results are recorded. If duplicate testing samples are created by mistake, discontinue the duplicate test sample so the test status will display correctly once all test results have been reported by the testing facility.

Creating a Testing Sample for Final Form - Each Item Categories

Metric Support Bulletin



This process will be used for any product category that is in the “- each” item category form within Metric. This process will be used for electronic sampling for distributors during the beginning inventory period.

- Go to **Packages** area on the navigational toolbar and select the **Active** tab.
- Select the **final form (-Each)** source package to be tested from the grid.
- Select the **Submit for Testing** button - **see Image 8**.

Tag	Src. H's	Src. Pkg's	Orig. Src. Pkg Label	Src. Pj's	Location	Sublocation	Item	Category	Item Strain	Quantity	UoM	Pj
> 1A41203000001C000028947	Purple Kush 111325	1A412030000016000027084				Packages Vault		Metrc Bliss Infused Preroll 1g	Infused Pre-Roll - Each	Metrc Bliss A	98 ea	ea

Image 8: Selecting the source package and submitting for testing

- In the **Submit for Testing** action window, enter the new Package UID for the testing sample being created and the location where the sample is stored in your facility.
- For the **Item** field, select the **Same Item** checkbox.
- On the right side of the **Submit for Testing** window, deduct the required amount from the source package (Package #1) and add it to the new testing sample package.
- Select the correct final form lab test batch required. In this example, we are selecting AU Infused Preroll. Then select **Submit for Testing** to complete the creation of the new test sample - **see Image 9**.

Metric Support Bulletin



New Package Sample # 1

New Tag: 1A41203000001C000029022

Location: Metric Room

Sublocation: Type part of the Sublocation name

Quantity: 1 Each

Note:

Package Date: 01/08/2026

Required Testing: AU Infused Prerolls Medical Infused Prerolls R&D Testing - Aspergillus R&D Testing - Metals R&D Testing - Microbials - Salmonella

Image 9: Selecting the same item checkbox

Important: A test sample package can be identified by the graduated cylinder icon – see Image 10 below.

Tag	Src. H's	Src. Pkg's	Orig. Src. Pkg Label	Src. Pkg's	Location	Sublocation	Item	Category	Item Strain	Quantity	UoM	P.B. No.	LT. Status	Ex.
> 1A41203000001C000029017	(multi-harvest)	1A41203000001C000028991		Bulk oil to jars	Packages	Vault	1g Vape Cart	Vape Cartridge - Each		3 ea	ea		SubmittedForTesting	Y
> 1A41203000001C000029018					Packages	Vault	Metric Bliss Oil	Concentrate/Extract - Ruk		4,499 g	g		SubmittedForTesting	N

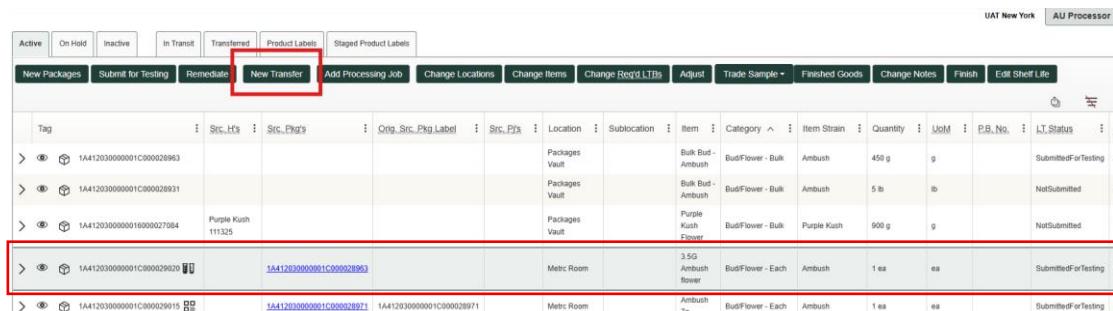
Image 10: Testing sample icon

Important: If multiple testing samples are created, the testing status will remain TestingInProgress until all test results are recorded. If duplicate testing samples are created by mistake, discontinue the duplicate so the test status will display correctly once all test results have been reported by the testing facility.

Creating a Transfer for a Testing Sample

After creating a testing sample, transfer the sample to the testing facility for analysis.

- Go to **Packages** area on the navigational toolbar and select the **Active** tab.
- Select the test sample to be transferred on the packages grid. Reminder – Testing sample packages are identified by the graduated cylinder icon.
- Select the **New Transfer** button - **see Image 11**.



Tag	Src. H's	Src. Pkg's	Orig. Src. Pkg Label	Src. Pkg's	Location	Sublocation	Item	Category	Item Strain	Quantity	UoM	P.B. No.	LT. Status	f
> 1A412030000001C300028983					Packages	Vault	Bulk Bud - Ambush	BudFlower - Bulk	Ambush	450 g	g		SubmittedForTesting	
> 1A412030000001C300028981					Packages	Vault	Bulk Bud - Ambush	BudFlower - Bulk	Ambush	5 lb	lb		NotSubmitted	
> 1A4120300000016000027084	Purple Kush	111325			Packages	Vault	Purple Kush Flower	BudFlower - Bulk	Purple Kush	900 g	g		NotSubmitted	
> 1A412030000001C300029020			2A412030000001C300028983		Metric Room		3.5G Ambush flower	BudFlower - Each	Ambush	1 ea	ea		SubmittedForTesting	
> 1A412030000001C300029015			2A412030000001C300028971		Metric Room		7g Ambush	BudFlower - Each	Ambush	1 ea	ea		SubmittedForTesting	

Image 11: Selecting New Transfer

- In the **New Transfer** action window, enter the destination facility (testing facility), planned route, transporter license number, transporter phone number, driver information, vehicle information, and for the transfer type, select **Transfer to Testing Facility**. The package will already be populated in the package area. Then select the **Register Transfer** button to create the transfer. - **see Image 12**.

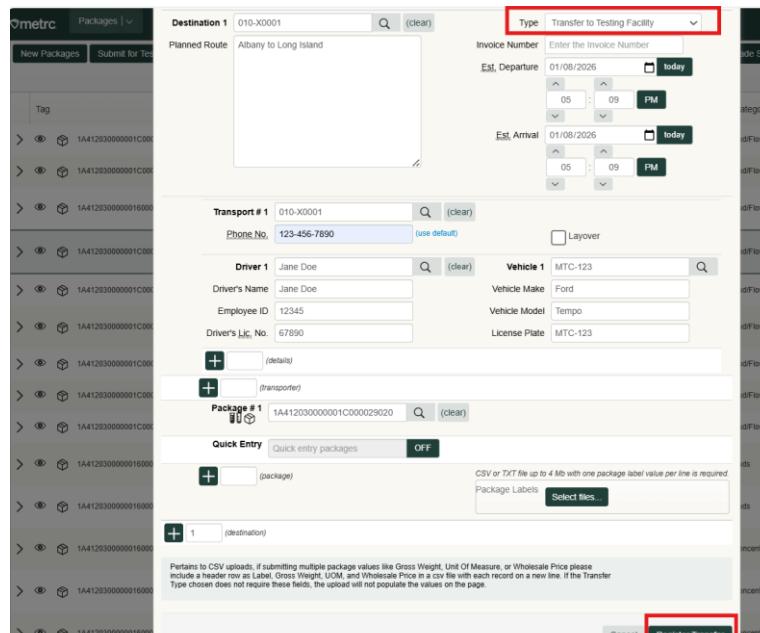


Image 12: Selecting transfer type and register transfer

Metric Support Bulletin



- To view the registered transfer, go to the **Transfers** area dropdown on the navigational toolbar and select the **Outgoing** tab.
- The recently created transfer will be listed in the Outgoing transfers grid - **see Image 13.**

Manifest	Destination	Stops	Pkg's	Employee
> 0000004405	010-X0001 (Testing Lab)	1	1	Jessica Painter
> 0000003703	010-X0001 (Testing Lab)	1	1	Arlene Hubbard
> 0000003402	403-X0001 (AU Distributor)	1	1	METRC INDUSTRY ADMIN

Image 13: Viewing outgoing transfer

Important: For additional guidance on submitting a test sample, review the available Beginning Inventory training in [Metric Learn](#).

Testing Tips and Best Practices are also available in the Metric Expert widget within Metric - see image 14.

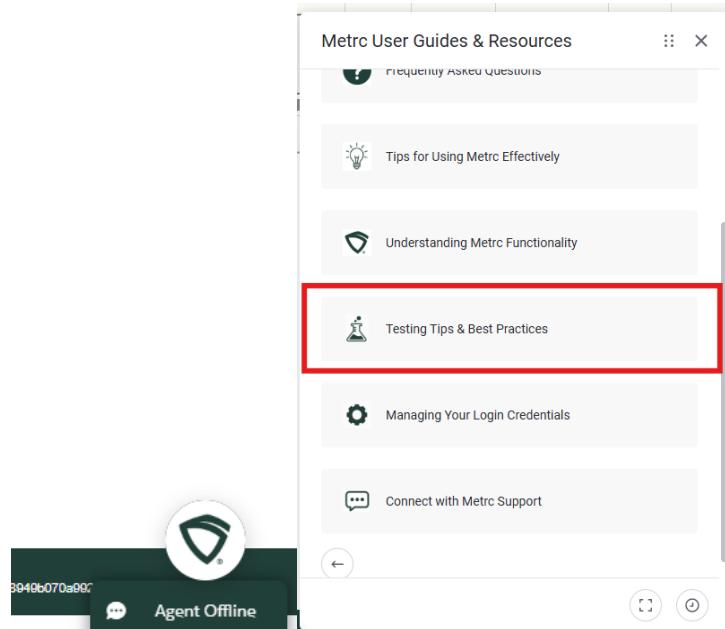


Image 14: Metric Expert Widget in Metric User Interface

Metric resources

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

Contact Metrc Support by navigating to Support.Metric.com, or from the Metrc System, click the Support area dropdown on the navigational toolbar and click support.metric.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.

Metric Learn: Metrc Learn is designed 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 [Metric Learn](https://Metric.Learn).

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

Thank you for your continued partnership.