Metrc Support Bulletin

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.

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Creating a Testing Sample for a Bulk Item Category Ready for Final Form Packaging
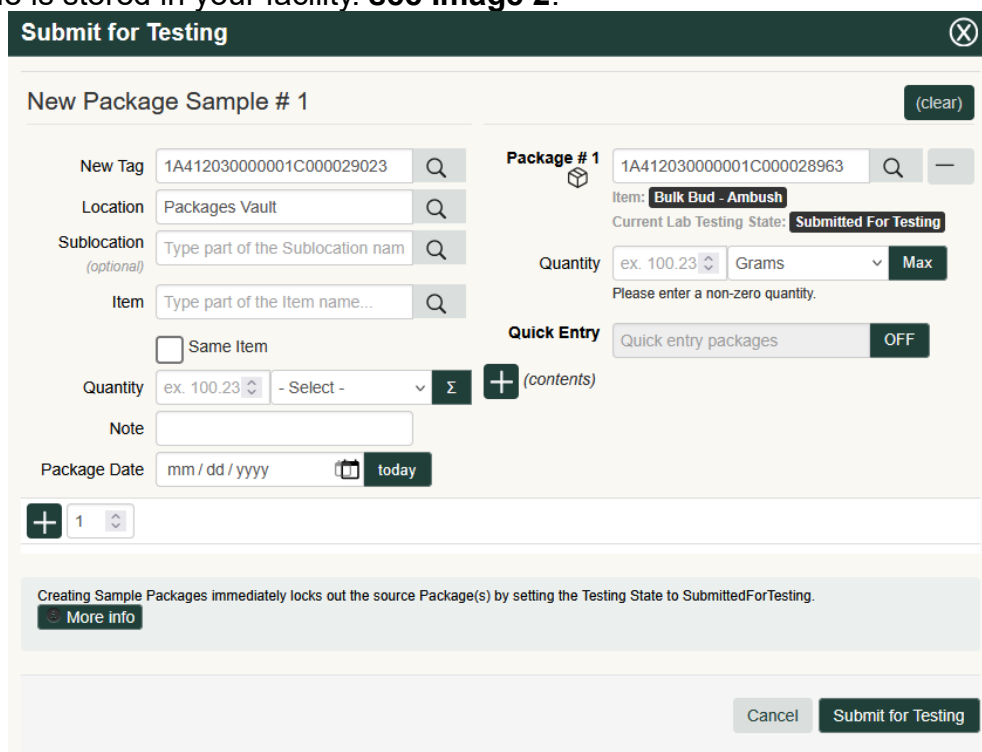
This process will be used when a product is in its bulk item category type within Metrc, but is in ready-to-consume final product form physically. Ready-to-consume final product form is a cannabis product that requires no further processing and ready for final packaging.

- 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**.
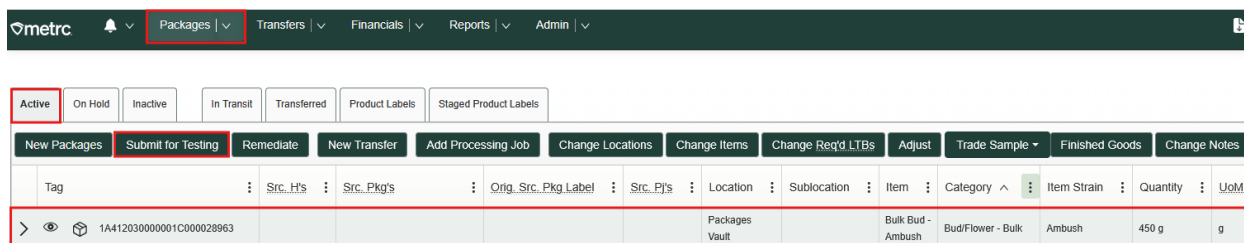
Image 1: Selecting the source package and submitting for testing
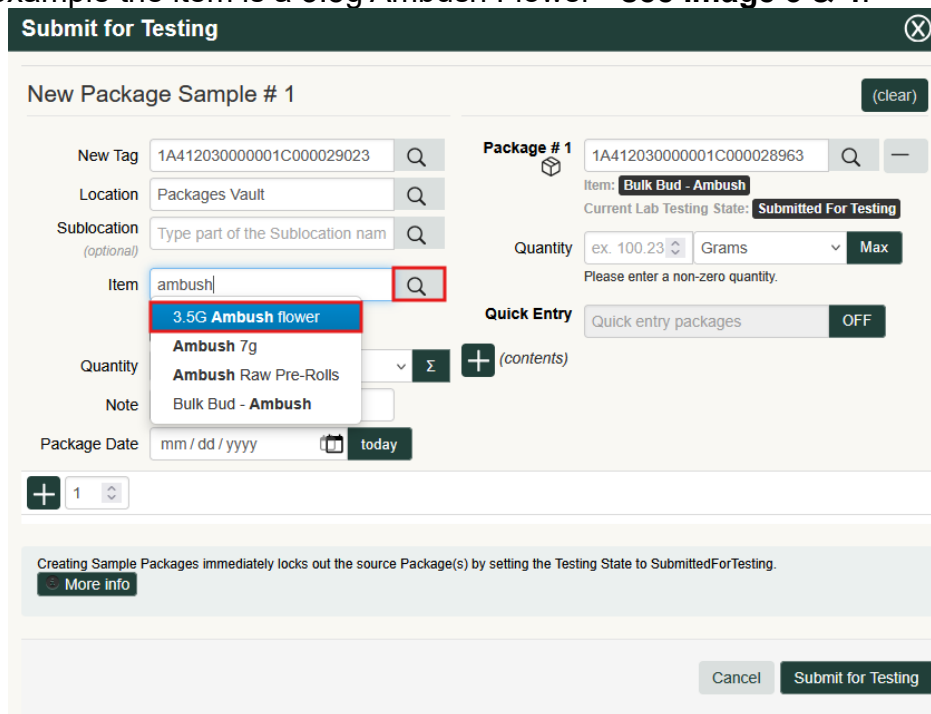
- In the **Submit for Testing** action window, fill in all the required fields including entering the new Package UID for the testing sample and the location where the sample is stored in your facility. **see Image 2**.

Image 2: Submit for testing action window

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- 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**.

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

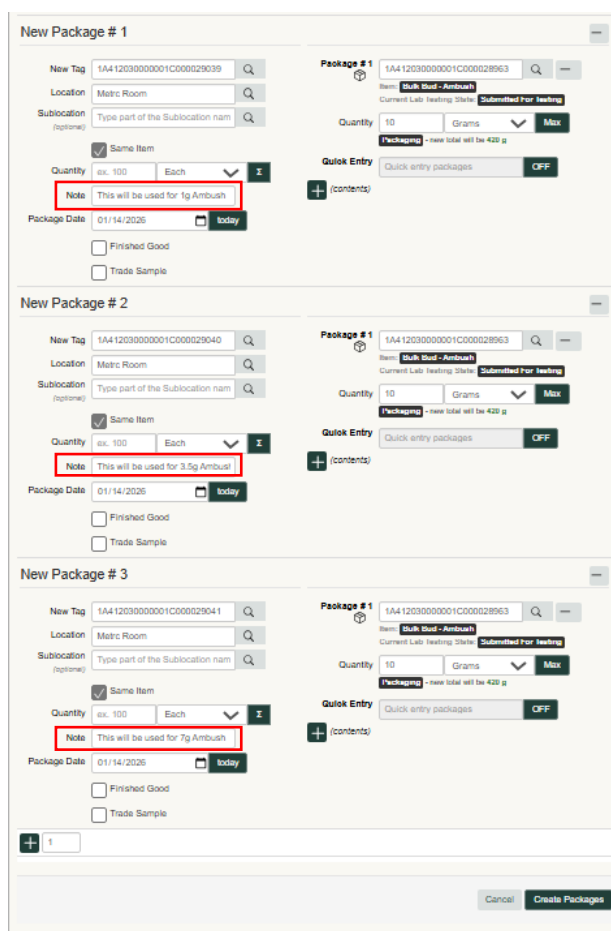**Image 4: Selecting the final form flower item type from the menu of items**

- **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**

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

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.

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Image 6: Inputting Testing sample information

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

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

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This process will be used for any product category that is in the "- each" item category form within Metrc. 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**.

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**.

Image 9: Selecting the same item checkbox

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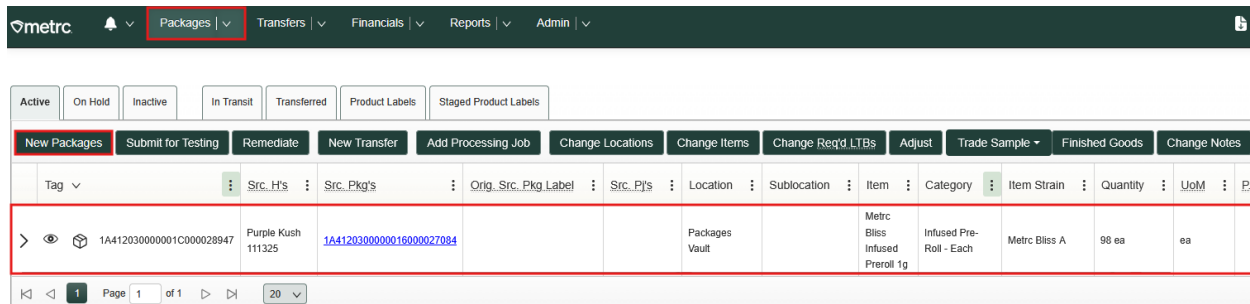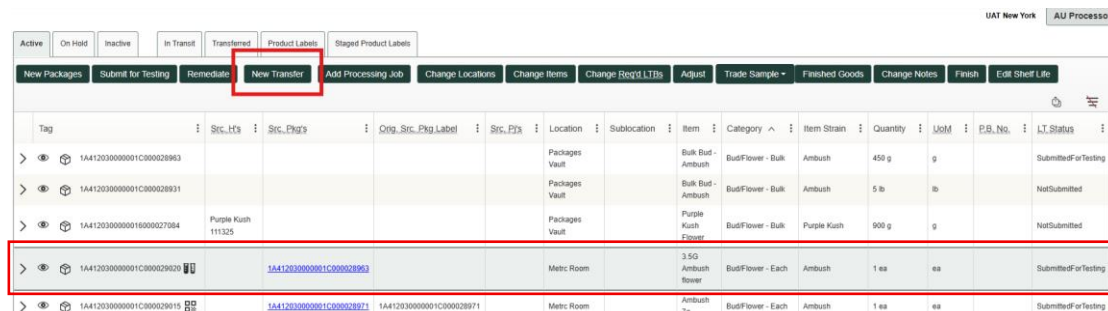

Image 10: Testing sample icon

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.*

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Creating a Transfer for a Testing Sample

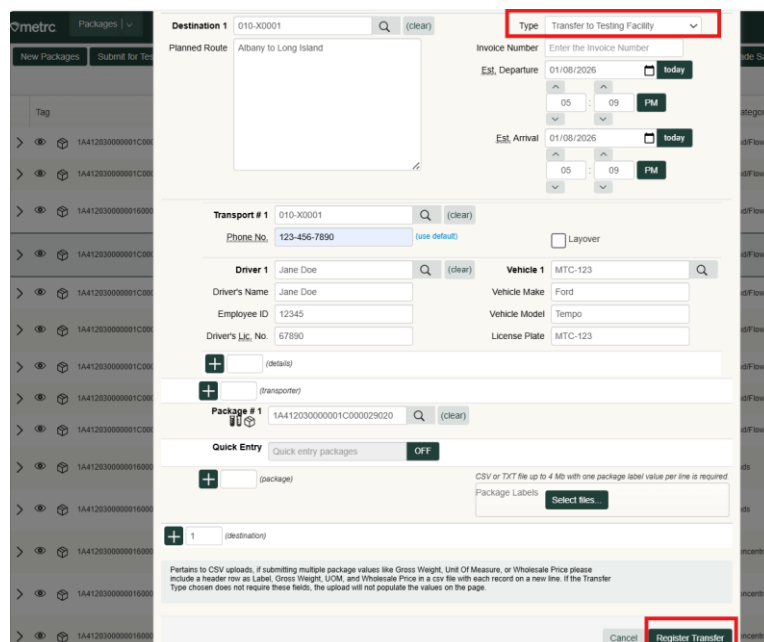After creating a testing sample, transfer the sample to the testing facility for analysis.

- 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**.

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**.
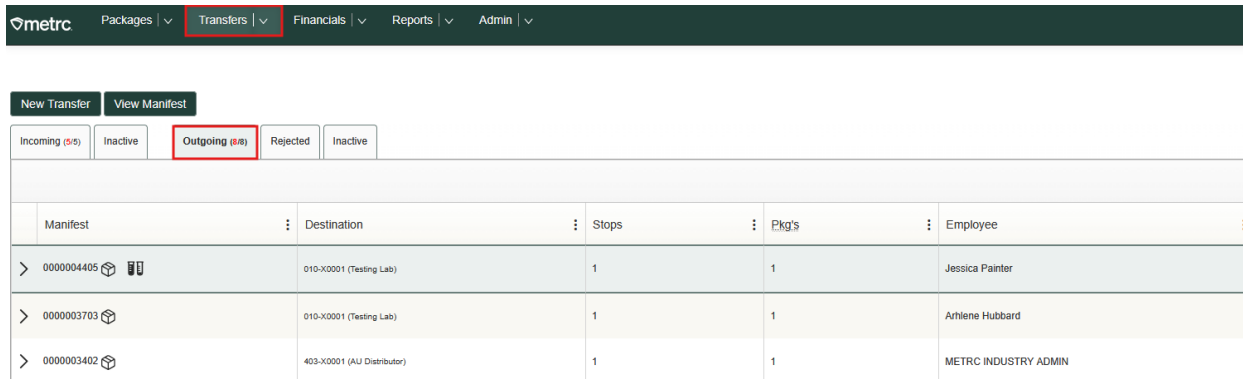
Image 12: Selecting transfer type and register transfer

- 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**.

Image 13: Viewing outgoing transfer

Important: For additional guidance on submitting a test sample, review the available Beginning Inventory training in Metrc Learn.

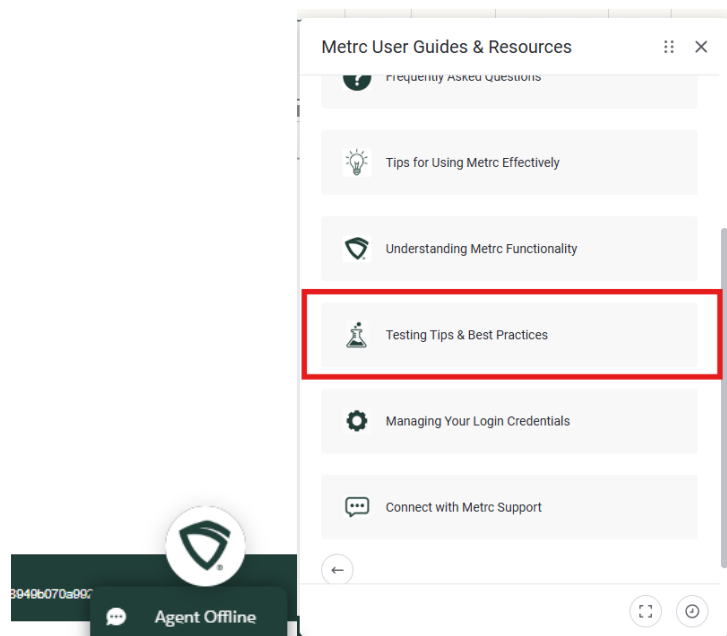**Testing Tips and Best Practices are also available in the Metrc Expert widget within Metrc - see image 14.**

Image 14: Metrc Expert Widget in Metrc User Interface

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Metrc resources

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

Contact Metrc Support by navigating to 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 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 Metrc 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.

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