

<b>Bulletin Number:</b> NY_IB_0006	<b>Distribution Date:</b> 1/14/2025	<b>Effective Date:</b> Ongoing
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> How to Submit a Testing Sample - Step by Step Guidance	
<b>Reason:</b> 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:

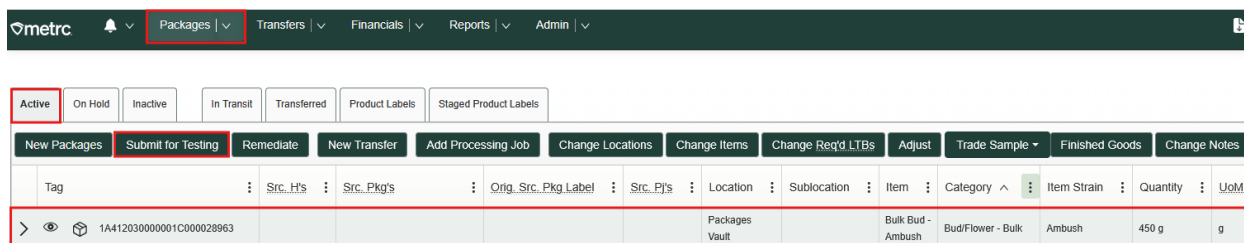
- [Creating a Testing Sample for a Bulk Item Category Ready for Final Form Packaging](#)
- [Creating a Testing Sample for Final Form - Each Item Categories](#)
- [Creating a Transfer for a Testing Sample](#)

Please read on for additional information.

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

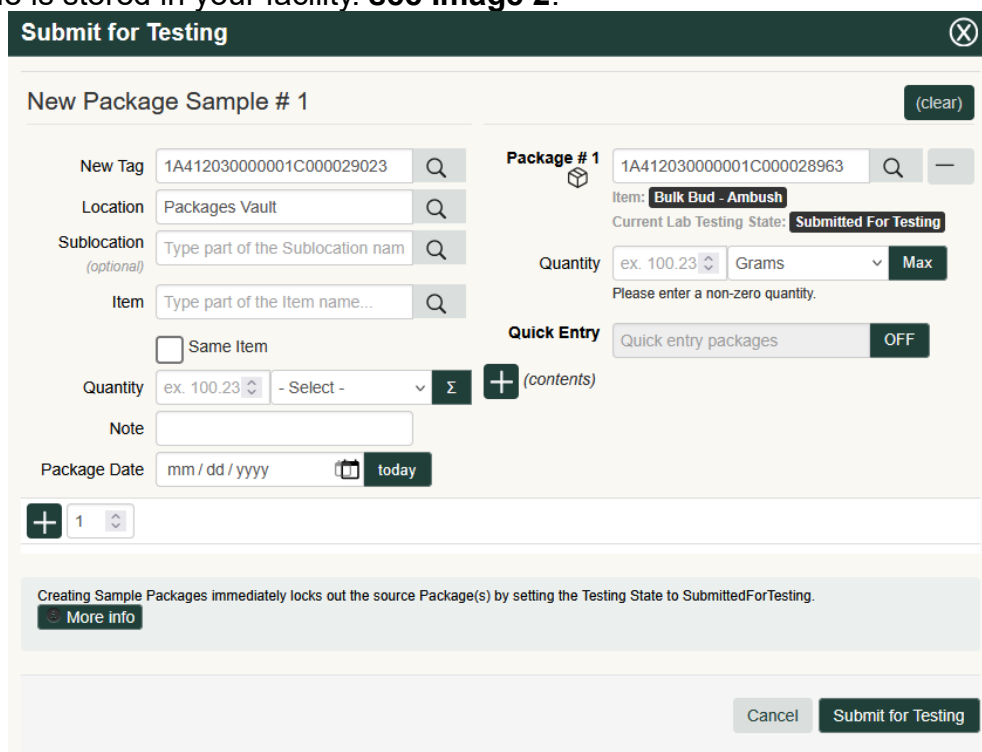
This process will be used when a product is in its bulk item category type within Metrc, but is in ready-to-consume final product form physically. Ready-to-consume final product form is a cannabis product that requires no further processing and ready for final packaging.

- 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**

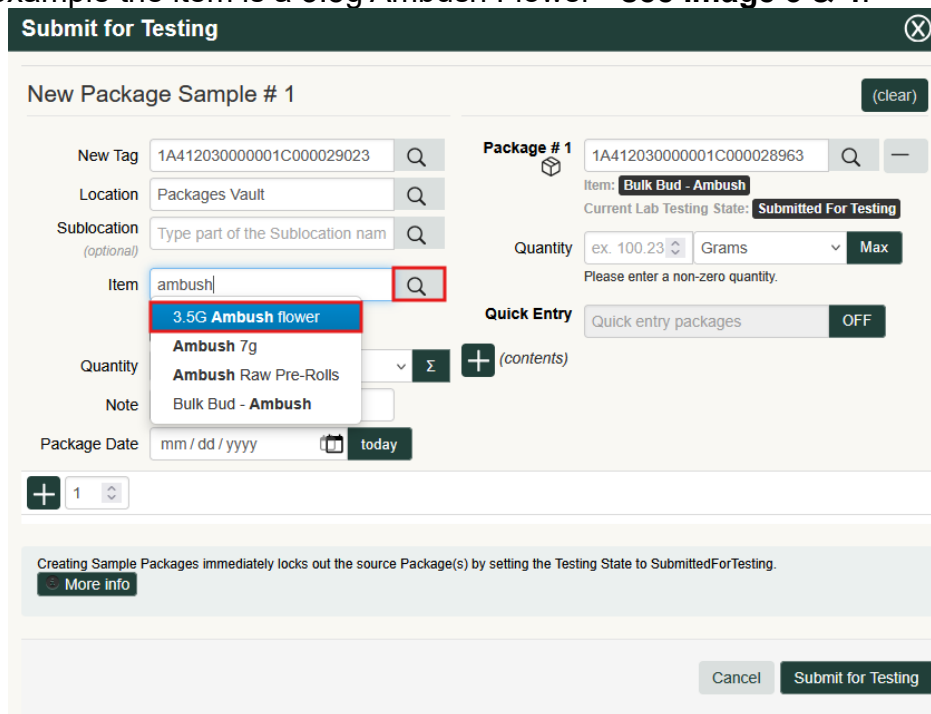
- In the **Submit for Testing** action window, fill in all the required fields including entering the new Package UID for the testing sample and the location where the sample is stored in your facility. see Image 2.



The screenshot shows the 'Submit for Testing' action window. It has a title bar 'Submit for Testing' with a close button. Below the title bar, there is a section 'New Package Sample # 1' with a '(clear)' button. The form contains several fields: 'New Tag' (1A412030000001C000029023), 'Location' (Packages Vault), 'Sublocation (optional)' (Type part of the Sublocation nam), 'Item' (Type part of the Item name...), 'Quantity' (ex. 100.23), 'Package Date' (mm / dd / yyyy), and 'Note'. There are also buttons for 'Same Item', 'Quick Entry', and 'Max'. A 'Package # 1' section shows the package UID (1A412030000001C000028963) and the item name (Bulk Bud - Ambush). The 'Current Lab Testing State' is 'Submitted For Testing'. At the bottom, there are 'Cancel' and 'Submit for Testing' buttons. A message at the bottom states: 'Creating Sample Packages immediately locks out the source Package(s) by setting the Testing State to SubmittedForTesting. More info'.

**Image 2: Submit for testing action window**

- 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** (close icon)

New Package Sample # 1 (clear)

New Tag: 1A412030000001C000029023 (magnifying glass)

Location: Packages Vault (magnifying glass)

Sublocation (optional): Type part of the Sublocation name (magnifying glass)

Item: ambush (magnifying glass) **3.5G Ambush flower** (selected)

Quantity: Ambush 7g (dropdown) + (contents)

Note: Bulk Bud - Ambush

Package Date: mm / dd / yyyy (calendar icon) today

Package # 1: 1A412030000001C000028963 (magnifying glass)

Item: Bulk Bud - Ambush

Current Lab Testing State: Submitted For Testing

Quantity: ex. 100.23 (dropdown) Grams (dropdown) Max (button)

Please enter a non-zero quantity.

Quick Entry: Quick entry packages (button) OFF (button)

+ 1 (dropdown)

Creating Sample Packages immediately locks out the source Package(s) by setting the Testing State to SubmittedForTesting. (More info button)

Cancel Submit for Testing

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

Submit for Testing

Package # 1

1A412030000001C00029022

1A412030000001C00028963

Bulk Bud - Ambush

Submit for Testing

Remediate

New Transfer

Add

14412030000001C00028963

14412030000001C00029022

Location Packages Vault

Change Notes

Finish

Edit Shelf Life

Quantity

Unit

P.D. No.

Str. P.D.

LT Status

Weight

Submit for Testing

Select

Add Item

Item	Category	Type	Quantity Type	Default LTS	UoM	Strain	CBD%	CBD	CBD.O.	CBD.A%	CBD.A.	THC%	THC	THC.D.	THC.A%	THC.A.	THC.A.D.
1g Vape Cart	Vape Cartridge - Each	Concentrate	CountBased	NotSubmitted	Each								70 mg				
3.5G Ambush flower	BudFlower - Each	Buds	CountBased	NotSubmitted	Each	Ambush						20%					
Ambush 7g	BudFlower - Each	Buds	CountBased	NotSubmitted	Each	Ambush						20%					
Ambush Raw Pre-Rolls	Raw Pre-Roll - Each	ShakeTrim	CountBased	NotSubmitted	Each	Ambush						1%					
Bulk Bud - Ambush	BudFlower - Bulk	Buds	WeightBased	NotSubmitted	Grams	Ambush											

1

2

3

4

Page 1 of 4

5

Viewing 1 - 5 (10 total)

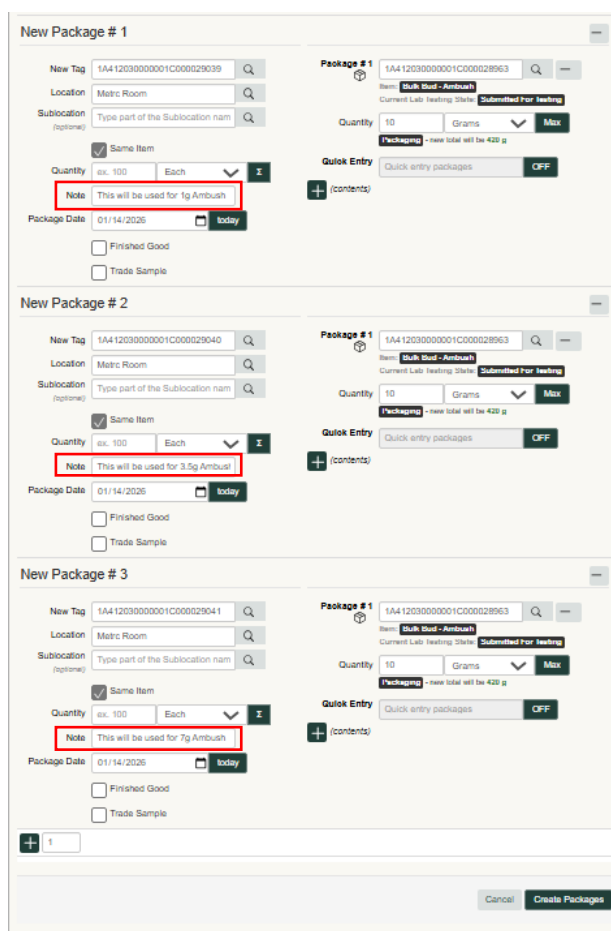
Cancel

Select

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.



The screenshot displays the 'New Package' form in the Metrc system, showing three packages being created. Each package has a 'Note' field highlighted with a red box, indicating the required amount for the final form item.

- New Package #1:** The 'Note' field states 'This will be used for 1g Ambush'.
- New Package #2:** The 'Note' field states 'This will be used for 3.5g Ambush'.
- New Package #3:** The 'Note' field states 'This will be used for 7g Ambush'.

Each package also includes fields for 'New Tag', 'Location', 'Sublocation', 'Quantity', 'Package Date', and 'Package Type' (Finished Good or Trade Sample). The 'Quantity' field is set to '10' for all packages. The 'Package Date' is set to '01/14/2025'. The 'Package Type' is set to 'Finished Good'.

**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.

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		
>	>	>	1A412030000001C000029020	1A412030000001C000028963		Metrc Room		3.5G Ambush flower	Bud/Flower - Each	Ambush
>	>	>	1A412030000001C000029015	1A412030000001C000028971	1A412030000001C000028971	Metrc Room		Ambush 7g	Bud/Flower - Each	Ambush

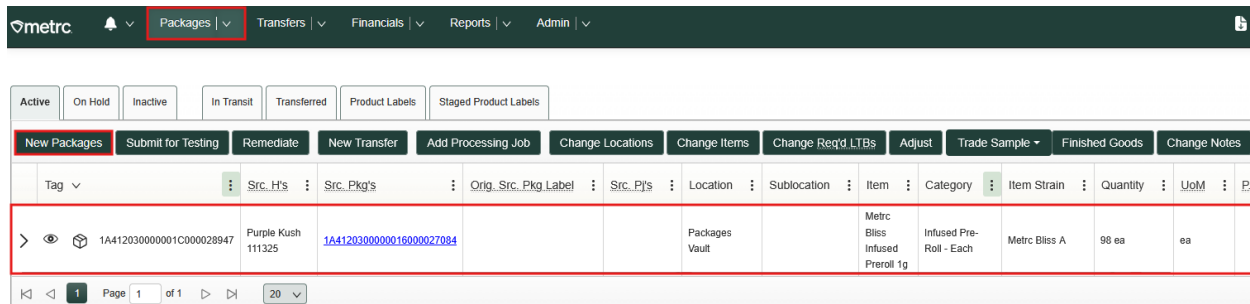
Image 7: Testing sample icon

**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

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.

<div> <div>Active</div> <div>On Hold</div> <div>Inactive</div> <div>In Transit</div> <div>Transferred</div> <div>Product Labels</div> <div>Staged Product Labels</div> </div>														
<div> <div>New Packages</div> <div>Submit for Testing</div> <div>Remediate</div> <div>New Transfer</div> <div>Add Processing Job</div> <div>Change Locations</div> <div>Change Items</div> <div>Change Req'd LTs</div> <div>Adjust</div> <div>Trade Sample</div> <div>Finished Goods</div> <div>Change Notes</div> <div>Finish</div> <div>Edit Shelf Life</div> </div>														
Tag	Src. LTs	Src. Pkg's	Orig. Src. Pkg. Label	Src. Pkg's	Location	Sublocation	Item	Category	Item Strain	Quantity	UoM	P.B. No.	LT Status	EC
>  1A412030000001C00002917	(multi-harvest)	1A412030000001C000028991			Bulk oil to jars	Packages Vault	1g Vape Cart	Vape Cartridge - Each		3 ea	ea		SubmittedForTesting	Yes
>  1A412030000001C00002918						Packages Vault	Metrc Bliss Oil	Concentrate/Extract - Bulk		4.499 g	g		SubmittedForTesting	No

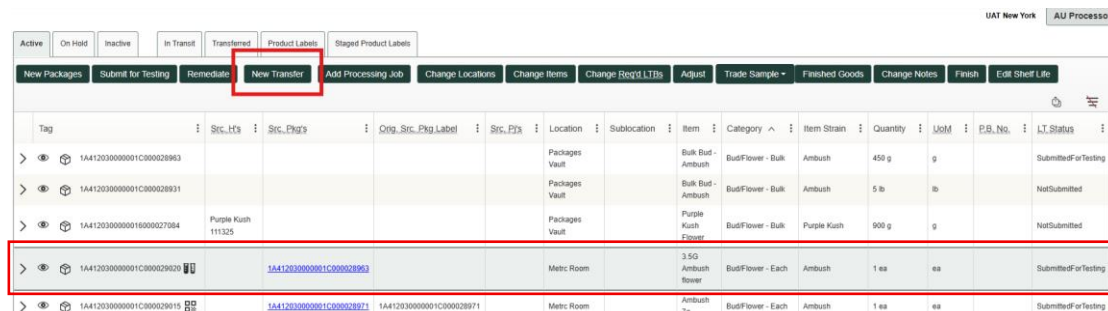
Image 10: Testing sample icon

**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.

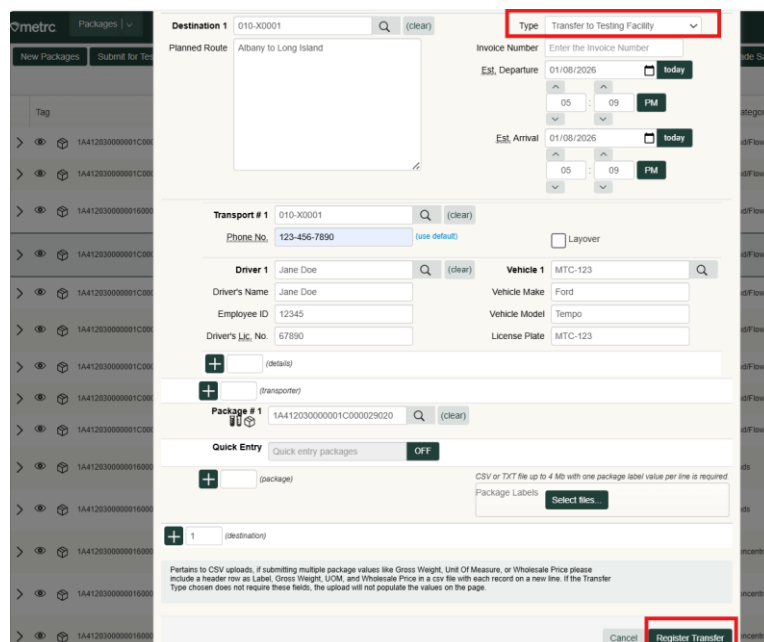
- Go to **Packages** area on the navigational toolbar and select the **Active** tab.
- Select the test sample to be transferred on the packages grid. Reminder – Testing sample packages are identified by the graduated cylinder icon.
- Select the **New Transfer** button - see Image 11.



Tag	Sec. Lts	Sec. Pkg's	Orig. Sec. Pkg Label	Sec. Pkg's	Location	Sublocation	Item	Category	Item Strain	Quantity	UoM	P.S. No.	LT Status
1A412030000001C00028963					Packages Vault		Bulk Bud-Ambush	BudFlower - Bulk	Ambush	450 g	g		Submitted for Testing
1A412030000001C00028931					Packages Vault		Bulk Bud-Ambush	BudFlower - Bulk	Ambush	5 lb	lb		Not Submitted
1A412030000001C00027084	Purple Kush	111325			Packages Vault		Purple Kush Exotic	BudFlower - Bulk	Purple Kush	900 g	g		Not Submitted
1A412030000001C00029020			1A412030000001C00028963		Metrc Room		3.50 Ambush flower	BudFlower - Each	Ambush	1 ea	ea		Submitted for Testing
1A412030000001C00029015			1A412030000001C00028923		Metrc Room		Ambush 7g	BudFlower - Each	Ambush	1 ea	ea		Submitted for Testing

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.



Destination 1: 010-X0001 (clear)

Planned Route: Albany to Long Island

Type: Transfer to Testing Facility

Invoice Number: Enter the Invoice Number

Est. Departure: 01/08/2026 (today) 05:09 PM

Est. Arrival: 01/08/2026 (today) 05:09 PM

Transport # 1: 010-X0001 (clear)

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

Layover: ☐

Driver 1: Jane Doe (clear)

Driver's Name: Jane Doe

Employee ID: 12345

Driver's Lic. No.: 67890

Vehicle 1: MTC-123 (clear)

Vehicle Make: Ford

Vehicle Model: Tempo

License Plate: MTC-123

Package # 1: 1A412030000001C00029020 (clear)

Quick Entry: Quick entry packages OFF

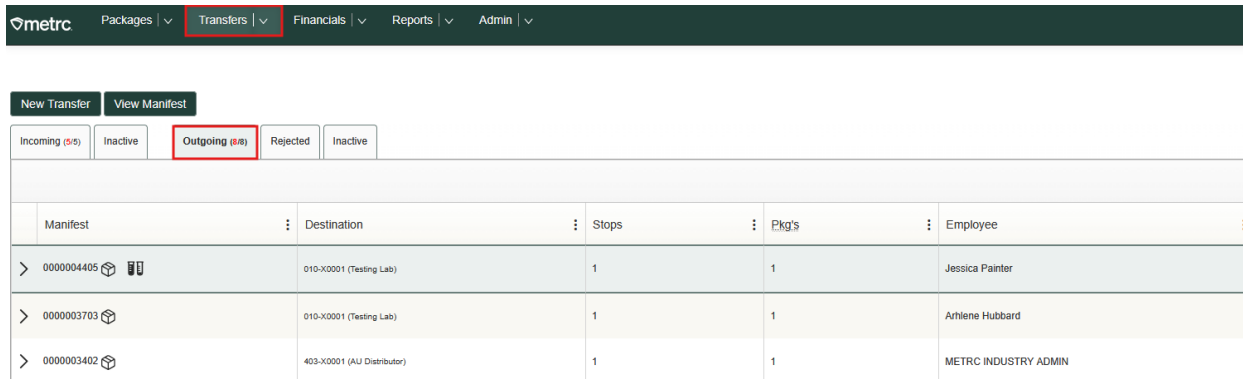
Package Labels: Select files

Register Transfer

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**.



Manifest	Destination	Stops	Pkg's	Employee
> 000004405	010-X0001 (Testing Lab)	1	1	Jessica Painter
> 000003703	010-X0001 (Testing Lab)	1	1	Arlene Hubbard
> 000003402	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.**

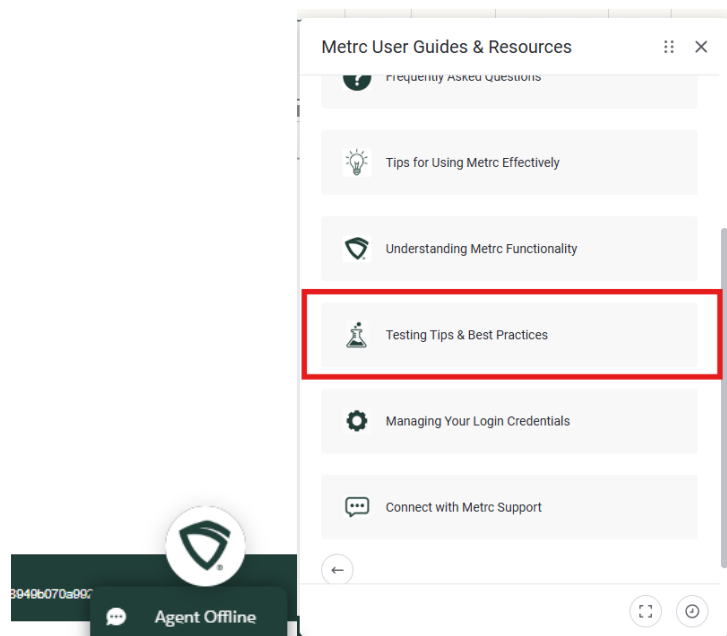


Image 14: Metric Expert Widget in Metric User Interface

### **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](https://support.metrc.com), or from the Metrc System, click the Support area dropdown on the navigational toolbar and click [support.metrc.com](https://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.