

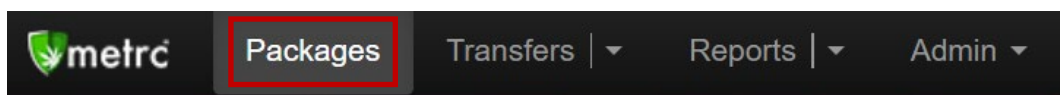
Bulletin Number: CA_IB_0004	Distribution Date: 1/24/2020	Effective Date: 1/24/2020
Contact Point: Metrc® Support	Subject: Creating Test Samples in Metrc for Regulatory Compliance Testing	
Reason: To provide guidance on properly creating test samples and correcting common errors		

This bulletin is intended for licensed Distributors and Microbusinesses (authorized to engage in distribution activities) to provide step by step instructions on how to create test sample packages and avoid common errors so there are no delays in moving your product.

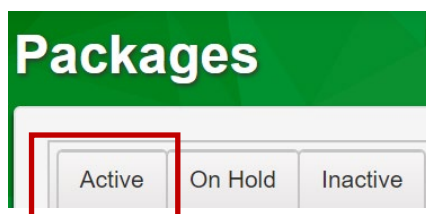
Below are detailed steps on how to properly create a test sample in Metric for regulatory compliance testing.

How to Create Test Sample Packages for Regulatory Compliance Testing

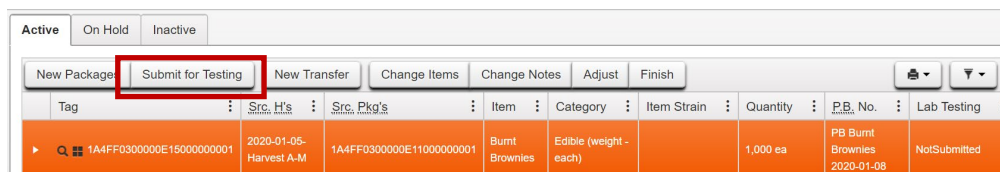
1. Select *Packages* from the top navigation bar.



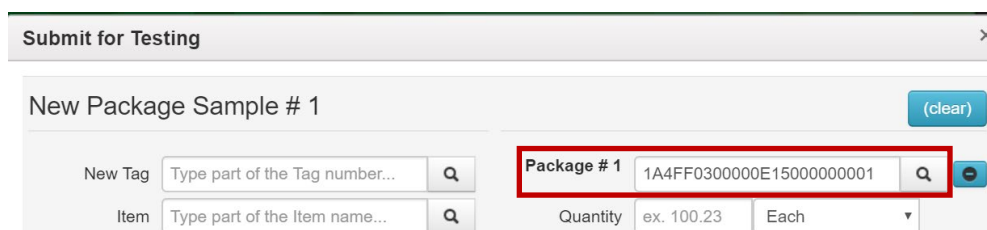
2. On the *Packages* page, select the *Active* tab.



3. Locate and click on the *Package* sampled by the testing laboratory to highlight it in orange and click on *Submit for Testing* button above the *Packages* grid.



4. On the *Submit for Testing* page, the *Package* sampled by the testing laboratory is populated in the *Package #1* field as the source package.



Submit for Testing

New Package Sample # 1

(clear)

New Tag

Type part of the Tag number...

Q

Package # 1

1A4FF0300000E15000000001

Q

Item

Type part of the Item name...

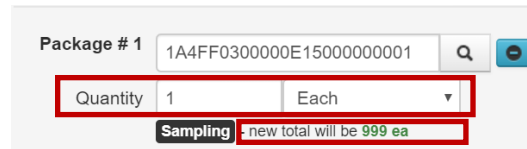
Q

Quantity

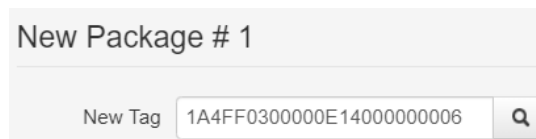
ex. 100.23

Each

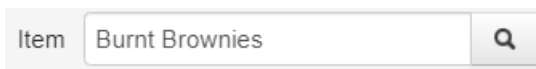
- Enter the representative sample amount obtained by the testing laboratory in the *Quantity* field for *Package #1*. **Do not enter the entire contents of the source package in the *Quantity* field.** The remaining quantity in *Package #1* after sampling displays below the *Quantity* field.



- Assign a *Tag* to the test sample package. (Provide the whole physical tag to the testing laboratory – one portion may be affixed to the physical container holding the representative sample, the other portion may be used on the laboratory’s paperwork i.e. chain of custody (COC))



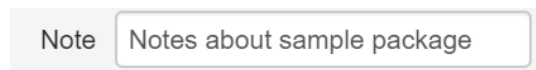
- Assign an *Item* to the test sample package. If you have not yet created the *Item*, you must do so before proceeding. Please see the *Metrc Manual* available in the *Support* menu for guidance on adding items.



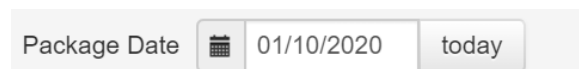
- Enter the representative sample amount obtained by the testing laboratory as the *Quantity* for the test sample package or select the Σ button to populate the same amount entered in the *Quantity* field for source *Package #1*. Both the test sample package *Quantity* and the source package *Quantity* in the action window should be the same amount that was physically taken by the testing laboratory.



- An optional *Note* can be entered, but is not required.



- Enter the date the test sample package was created in the *Package Date* field by selecting the *today* button.



- After verifying all of the entries, click the *Submit for Testing* button.



As a reminder, all test sample packages must also be electronically manifested in Metrc to the testing laboratory.

Example 1 – Creating a Test Sample from a Production Batch Packaged in Individual Units

Submit for Testing

New Package Sample # 1

(clear)

New Tag

1A4FF0300000E14000000006

Q

Package # 1

1A4FF0300000E15000000001

Q

⊖

Item

Burnt Brownies

Q

Quantity

1

Each

▼

Σ

Note

Notes about sample package

Package Date

01/10/2020

today

+

1

(contents)

Sampling

- new total will be 999 ea

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

More info

Submit for Testing

Cancel

Example 2 – Creating a Test Sample from a Bulk Flower Package

Submit for Testing

New Package Sample # 1

(clear)

New Tag

1A4FF0300000E14000000005

Q

Package # 1

1A4FF0300000E14000000002

Q

⊖

Item

Blue Dream Flower

Q

Quantity

10

Grams

▼

Σ

Note

Package Date

01/14/2020

today

+

1

(contents)

Sampling

- new total will be 39.978 lb

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

More info

Submit for Testing

Cancel

Example 3 – Creating a Test Sample from an “Overweight” Package

When a package exceeds the quantity limit for mandatory regulatory compliance testing i.e. a flower package is greater than 50.0 pounds, the entire contents in the package should be repackaged into two or more new packages that are within quantity limits before creating a test sample.

For example, before creating a test sample package from a bulk flower package weighing 80 pounds, the distributor repackages the entire contents of the package into two 40-pound packages.

Package Exceeding Weight Limit:

Tag	Src. H's	Src. Pkg's	Item	Category	Item Strain	Quantity	P.B. No.	Lab Testing
1A4FF0300000E11000000003	2019-12-15-Harvest A-H		Blue Dream Flower	Flower	Blue Dream	80 lb		NotSubmitted

Page 1 of 1 20 rows per page Viewing 1 - 1 (1 total)

1. Repackage entire contents to distribute the product weight to new packages that are within quantity limits.

Tag Sequence

1A4FF0300000E14000000001

Q

✓

Item

Blue Dream Flower

Q

✓

Unit of Measure

Pounds

Σ

Note

Split Overweight Package

✓

Package Date

01/13/2020

today

✓

Production Batch

✓

Quantity

ex. 100.23

- Select -

✓

Mini-template: Add Content Packages

Package

1A4FF0300000E11000000003

Q

✓

+

Quantity

40

Pounds

✓

New Tag

1A4FF0300000E14000000001

Q

Item

Blue Dream Flower

Q

Quantity

40

Pounds

Σ

Note

Split Overweight Package

Package Date

01/13/2020

today

Production Batch

Package # 1

1A4FF0300000E11000000003

Q

⊖

Quantity

40

Pounds

✓

Packaging

- new total will be 0 lb

Finish Package

(contents)

New Tag

1A4FF0300000E14000000002

Q

Item

Blue Dream Flower

Q

Quantity

40

Pounds

Σ

Note

Split Overweight Package

Package Date

01/13/2020

today

Production Batch

Package # 1

1A4FF0300000E11000000003

Q

⊖

Quantity

40

Pounds

✓

Packaging

- new total will be 0 lb

Finish Package

(contents)

+

1

Create Packages

Cancel

2. *Finish* the original source package, which has zero quantity after repackaging.

Active On Hold Inactive									
New Packages Submit for Testing New Transfer Change Items Change Notes Adjust Finish									
Tag	Src. H's	Src. Pkg's	Item	Category	Item Strain	Quantity	P.B. No.	Lab Testing	
▶ 1A4FF0300000E14000000001	2019-12-15-Harvest A-H	1A4FF0300000E11000000003	Blue Dream Flower	Flower	Blue Dream	40 lb		NotSubmitted	✕
▶ 1A4FF0300000E14000000002	2019-12-15-Harvest A-H	1A4FF0300000E11000000003	Blue Dream Flower	Flower	Blue Dream	40 lb		NotSubmitted	✕
▶ 1A4FF0300000E11000000003	2019-12-15-Harvest A-H		Blue Dream Flower	Flower	Blue Dream	0 lb		NotSubmitted	✕

Page 1 of 1 20 rows per page Viewing 1 - 3 (3 total)

Finish Packages

Package # 1

Package

1A4FF0300000E11000000003

Q

Date Finished

01/14/2020

today

+

1

Finish Packages

Cancel

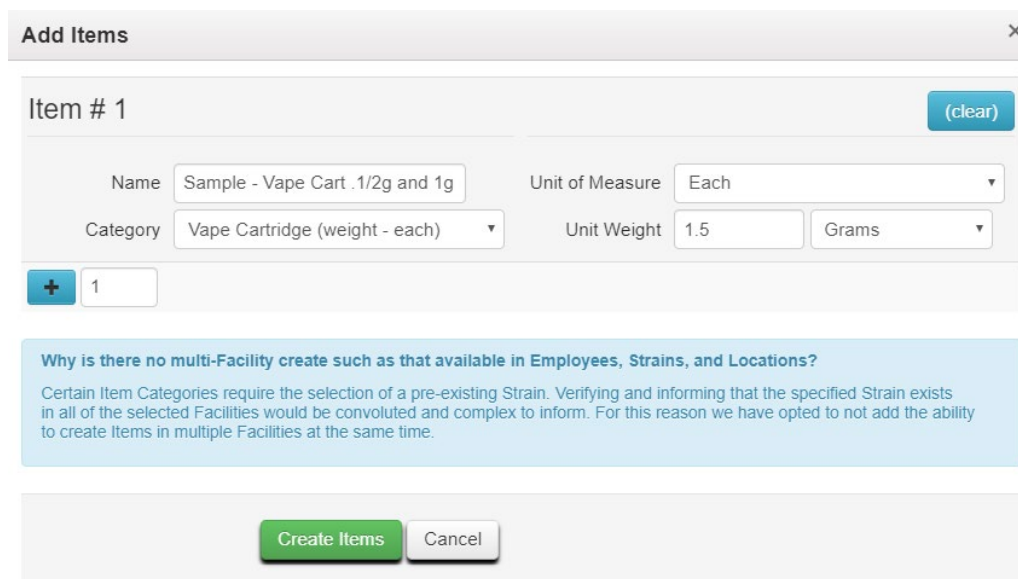
3. Create test sample packages from the new packages derived from the original package that are within the quantity limits for testing. See steps and examples above for details.

Example 4 – Creating a Test Sample Package from Multiple Sizes of the Same Product Containing the Same Production Batch

The testing laboratory may sample multiple manufactured products as one batch, if the batch and recipe is exactly the same and the goods are in their final form including identical packaging/labeling. In the example below, the same production batch oil with the same terpene blend was filled into ½ gram and 1 gram vape cartridges. In this scenario, it is appropriate for the testing laboratory to obtain a representative sample from both packages.

In Metrc, after the representative sample of the mixed sizes is physically obtained, the distributor should electronically pull the number of units from the different sized source packages to create one Metrc test sample package to ensure results are associated to the various sized source packages.

- Before recording the test sample package in Metrc, ensure an *Item* is available to clearly identify the contents of the combined test sample package. In the vape cartridge example provided above, an *Item* name such as “Sample - Vape Cart 1/2g and 1g” could be used, and the *Unit Weight* should reflect the combined weight of the two cartridges (1.5 grams) as shown below.



Add Items [X]

Item # 1 [clear]

Name: Sample - Vape Cart .1/2g and 1g Unit of Measure: Each

Category: Vape Cartridge (weight - each) Unit Weight: 1.5 Grams

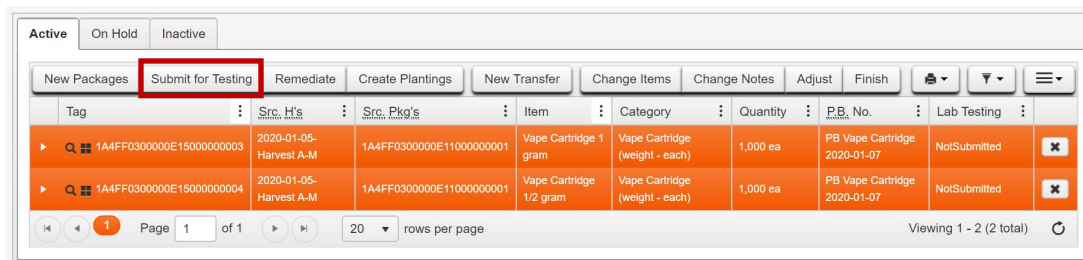
+ 1

Why is there no multi-Facility create such as that available in Employees, Strains, and Locations?

Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

Create Items Cancel

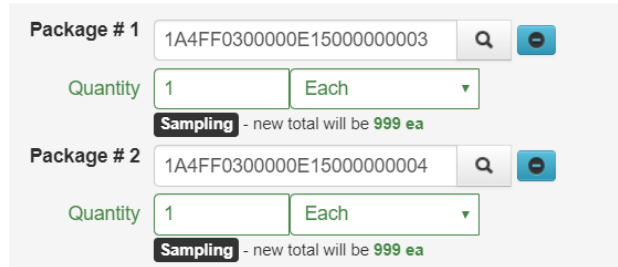
- Locate and click on the multiple *Packages* sampled by the testing laboratory while holding the Ctrl key to highlight both in orange. Click on *Submit for Testing* button above the *Packages* grid.



Tag	Src. H's	Src. Pkg's	Item	Category	Quantity	P.B. No.	Lab Testing
2020-01-05-Harvest A-M	1A4FF0300000E15000000003	1A4FF0300000E11000000001	Vape Cartridge 1 gram	Vape Cartridge (weight - each)	1,000 ea	PB Vape Cartridge 2020-01-07	NotSubmitted
2020-01-05-Harvest A-M	1A4FF0300000E15000000004	1A4FF0300000E11000000001	Vape Cartridge 1/2 gram	Vape Cartridge (weight - each)	1,000 ea	PB Vape Cartridge 2020-01-07	NotSubmitted

Page 1 of 1 20 rows per page Viewing 1 - 2 (2 total)

- On the *Submit for Testing* page, both *Packages* sampled by the testing laboratory are populated in the *Package #1* and *Package #2* fields as the source packages for the test sample package.



Package # 1 1A4FF0300000E15000000003 Q [minus]

Quantity 1 Each ▾

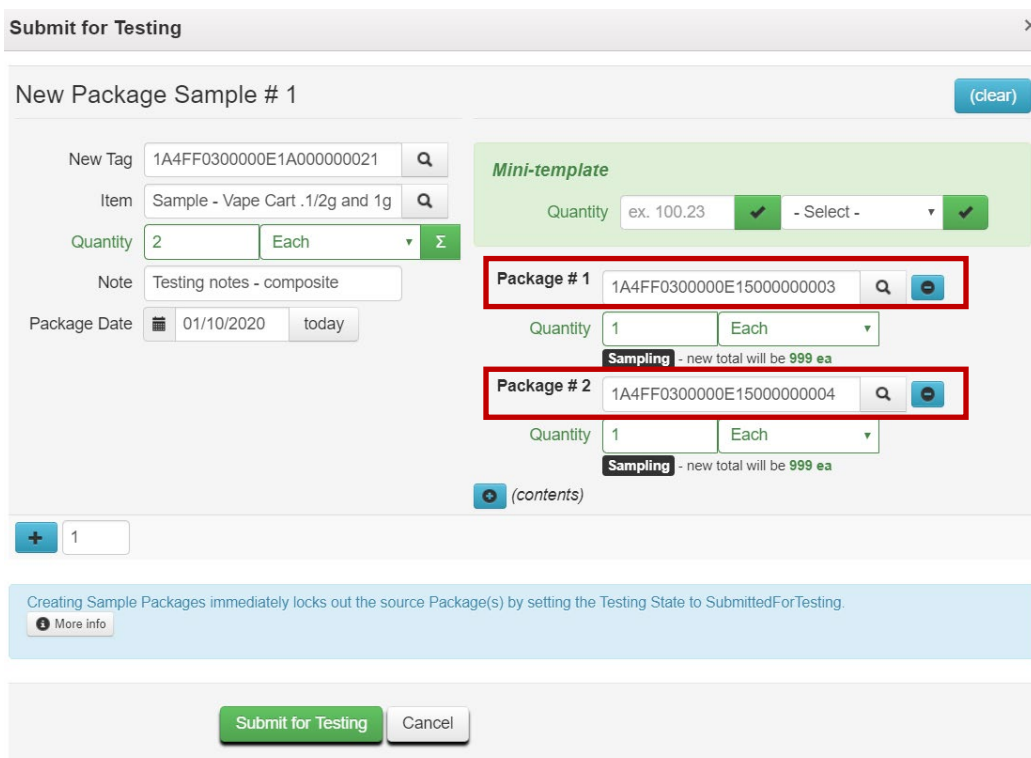
Sampling - new total will be 999 ea

Package # 2 1A4FF0300000E15000000004 Q [minus]

Quantity 1 Each ▾

Sampling - new total will be 999 ea

- Follow steps 5 through 11 above to create the test sample package.



Submit for Testing [close]

New Package Sample # 1 [clear]

New Tag 1A4FF0300000E1A0000000021 Q

Item Sample - Vape Cart .1/2g and 1g Q

Quantity 2 Each ▾ Σ

Note Testing notes - composite

Package Date 01/10/2020 today

Mini-template

Quantity ex. 100.23 ✓ - Select - ▾ ✓

Package # 1 1A4FF0300000E15000000003 Q [minus]

Quantity 1 Each ▾

Sampling - new total will be 999 ea

Package # 2 1A4FF0300000E15000000004 Q [minus]

Quantity 1 Each ▾

Sampling - new total will be 999 ea

[plus] (contents)

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

Submit for Testing Cancel

Common Errors and How to Correct

When errors are made during test sample package creation, the ability to move your products, even if the product passed regulatory compliance testing, can be impacted.

Below are some of the most common errors made by licensees and actions you can take to correct those errors.

Example 1 - Creating Multiple Test Sample Packages from the Same Package

Only **one** test sample package should be created from a package. Having more than one test sample package can cause the *Lab Testing State* of a package to be set to *Testing in Progress* after the testing laboratory has recorded the test results on the tested sample, preventing you from moving your product.

Tag	Src. H's	Src. Pkg's	Item	Category	Quantity	P.B. No.	Lab Testing
► 🔍 1A4FF0300000E1A000000030	2019-12-27-Harvest Room A-M		Skywalker Flower	Flower	0.997 kg		TestingInProgress ✕

Resolution:

If the duplicate test sample package is no longer in your inventory OR the test results have been recorded (*Lab Testing State* is *Testing in Progress*), contact Metrc Support for assistance.

If the duplicate test sample package remains in your inventory AND the test results have not yet been recorded on the sample package transferred to the testing laboratory (*Lab Testing State* is *Submitted for Testing*), the duplicate test sample package can be discontinued as outlined below. **DO NOT** adjust the duplicate test sample package to zero and *Finish* the package as this will guarantee the product will be locked *Testing in Progress* after all test results have been entered.

1. Select the ✕ *Discontinue* button on the far right of the row for the duplicate sample package.

Tag	Src. H's	Src. Pkg's	Item	Category	Quantity	P.B. No.	Lab Testing
► 🔍 1A4FF0300000E1A000000053	2019-12-27-Harvest Room A-M	1A4FF0300000E1A000000030	Skywalker Flower	Flower	2 g		TestingInProgress ✕

2. Confirm the discontinuance by selecting the *OK* button on the pop-up.

testing-ca.metrc.com says

Are you sure you wish to discontinue Package "1A4FF0300000E1A000000053"?

OK

Cancel

Discontinuing the package automatically returns the contents of the package back to the source package and the package moves to the *Inactive* tab on the *Packages* page.

Example 2 - Creating a Child Package from the Source Package Prior to the Testing Laboratory Entering/Uploading Electronic Results in Metrc

You should **not** create any child packages from a source package until the testing laboratory has entered the numerical test results and the COA is uploaded in Metrc. Once the test results for the source package are recorded and the *Lab Testing State* is set to *TestPassed*, a child package can be created and it will inherit the test results of the parent package.

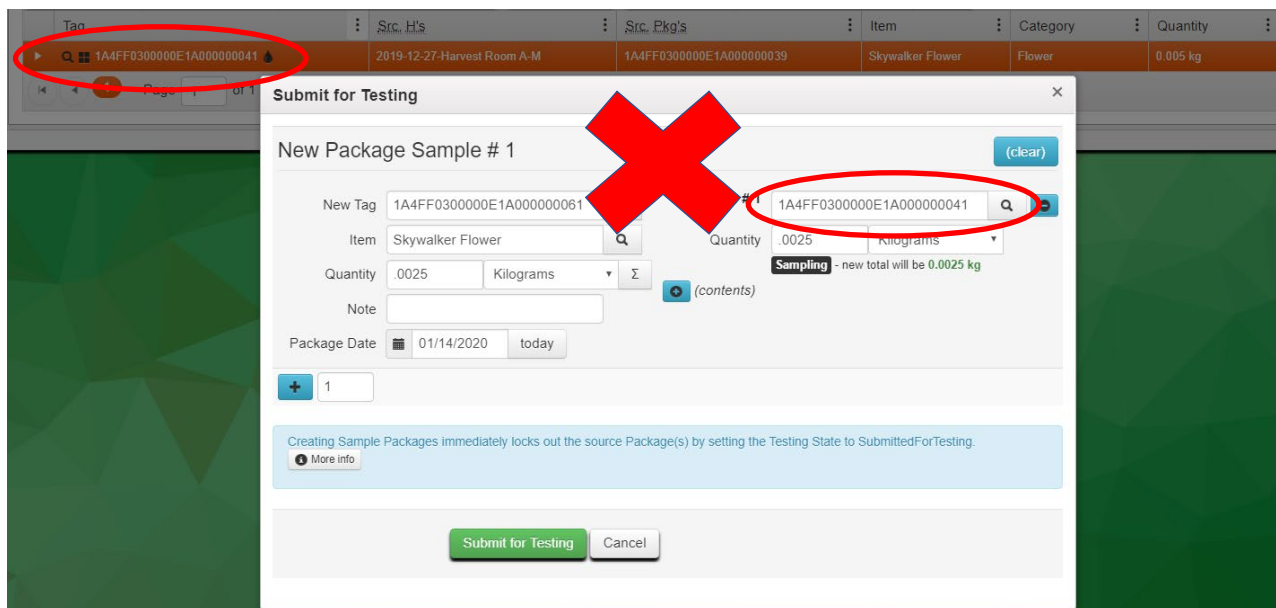
DO NOT create a child package and then pull a test sample from the child package. The test sample should **only** be pulled from a source package.

Resolution: If the error is discovered prior to transferring the samples to the testing laboratory, the test sample taken from the child package can be discontinued. See Example #1 for details.

If the samples have already been transferred to the testing laboratory, please contact Metrc Support for assistance.

Example 3 - Pulling from a Test Sample Package to Create a Test Sample Package

Creating a package from a test sample package creates a second sample package. After the testing laboratory has recorded the test results and uploaded the COA on one of the samples, the *Lab Testing State* of the original source package displays on the *Packages* grid as *Testing in Progress*.



Tag	Src. H's	Src. Pkg's	Item	Category	Quantity
1A4FF0300000E1A000000041	2019-12-27-Harvest Room A-M	1A4FF0300000E1A000000039	Skywalker Flower	Flower	0.005 kg

Submit for Testing

New Package Sample # 1

New Tag: 1A4FF0300000E1A000000061

Item: Skywalker Flower

Quantity: .0025 Kilograms

Note:

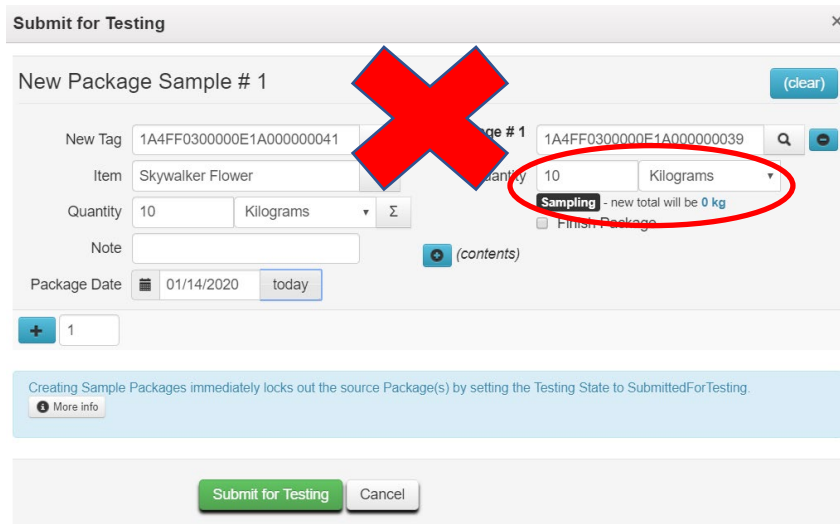
Package Date: 01/14/2020

Submit for Testing

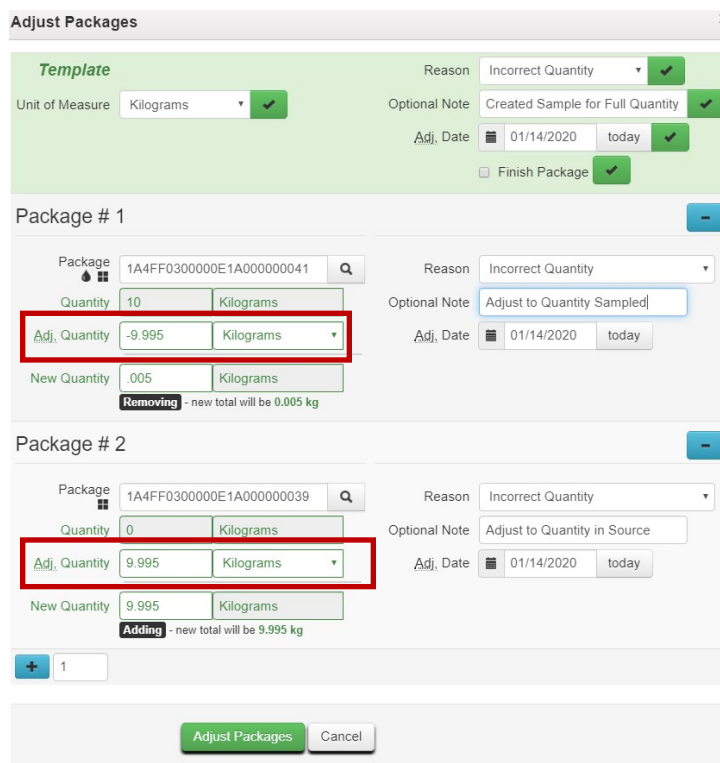
Resolution: See the Resolution to Example #1 above.

Example 4 - Pulling the Entire Contents of the Source Package into the Test Sample Package

The test sample should be created with a *Quantity* matching the amount sampled. Verify the new *Quantity* of the source package when creating the test sample package before clicking the *Submit for Testing* button. It should **not** be zero.



Resolution: While the sample is still in your inventory, discontinue the test sample and remake it correctly. (See Example #1 for steps to discontinue the sample.) If the test sample has been rejected by the testing laboratory because of the discrepancy between the physical sample and the quantity reflected on the manifest, adjust both the test sample package and the source package to the correct quantities.



Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions.