

Bulletin Number: MI_IB_0015	Distribution Date: 10/01/19	Effective Date: 10/14/19
Contact Point: Metrc® Support	Subject: Upcoming Configuration Change on Opening Balance Packages and External Transfers	
Reason: MRA and Metrc are providing notice to all licensees on an upcoming configuration change that will restrict users from creating “Opening Balance Packages” and a new process for Caregiver product intake.		

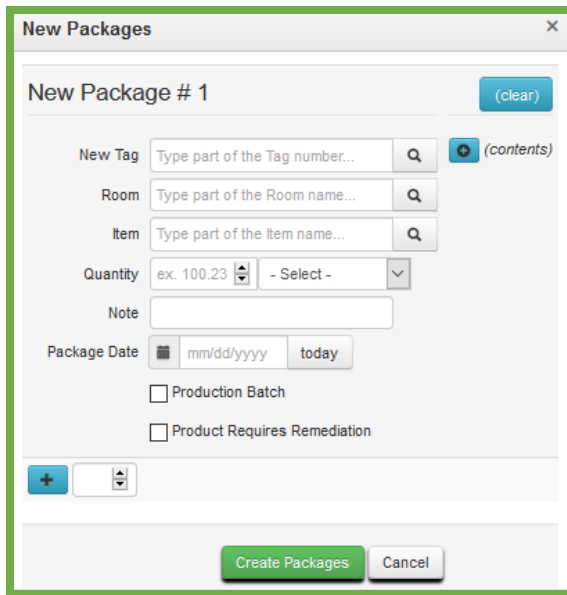
Greetings Metrc Users,

This bulletin is to provide notice that on **October 14th, 2019** the MRA will be making a configuration change in Metrc that will no longer allow the creation of “Opening Balance Packages” for all active licensees. This feature has been used during the beginning inventory phase for licensees entering the system for the first time and designating caregiver intake. Moving forward, all caregiver product intake will need to be entered into Metrc through the External Transfers feature.

Please find on the following pages a detailed description of the configuration changes:

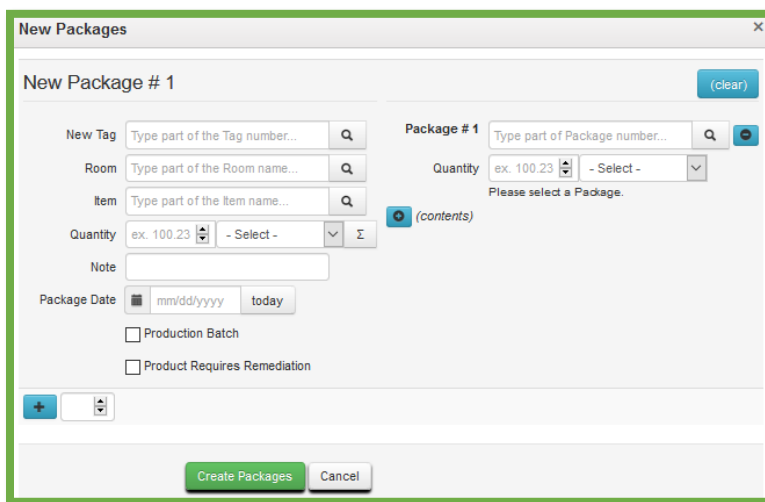
Removal Of Opening Balance Packages

When users currently select the New Packages button in Metrc the image in **Figure 1** will populate. This is what Metrc references as an “Opening Balance Package” that do not require a source package or harvest to be designated upon creation. On **October 14th, 2019** this feature will be removed for all licensees requiring a source package or harvest designation of all new packages as seen in **Figure 2**.



The 'New Packages' window displays 'New Package # 1'. It includes input fields for 'New Tag', 'Room', and 'Item', each with a search icon. The 'Quantity' field shows 'ex. 100.23' and a '- Select -' dropdown. There is a 'Note' text area and a 'Package Date' selector with 'mm/dd/yyyy' and 'today' options. Two checkboxes are present: 'Production Batch' and 'Product Requires Remediation'. At the bottom are '+', '-' buttons, a 'Create Packages' button, and a 'Cancel' button. A '(clear)' button is in the top right.

Figure 1: Opening Balance Package



The 'New Packages' window displays 'New Package # 1'. It includes input fields for 'New Tag', 'Room', and 'Item', each with a search icon. The 'Quantity' field shows 'ex. 100.23' and a '- Select -' dropdown. There is a 'Note' text area and a 'Package Date' selector with 'mm/dd/yyyy' and 'today' options. Two checkboxes are present: 'Production Batch' and 'Product Requires Remediation'. At the bottom are '+', '-' buttons, a 'Create Packages' button, and a 'Cancel' button. A '(clear)' button is in the top right. A new 'Package # 1' section is added on the right, containing a search field and a 'Quantity' dropdown. Below this section is a '(contents)' button and the text 'Please select a Package.'

Figure 2: Source Package

External Transfers Steps

External Transfers is a two-step process which will require a user to go to the External Transfers Grid as seen in **Figure 3** create and then complete an External Transfer. The two-step process is as follows:

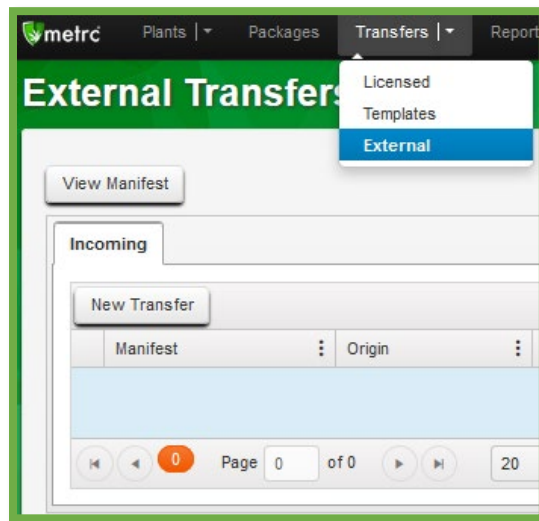


Figure 3: External Transfers Grid

Step 1: Creating an External Transfer

Once you've selected "External" under the Transfers tab on the navigation bar. Create the incoming external transfer by clicking the "New Transfer" button. This will bring up a screen (**Figure 4**) where you will enter the required information to begin the process of receiving caregiver inventory. You should complete the fields as follows:

Type: Select the Caregiver transfer option from the dropdown menu.

Caregiver License Number: Registered Caregivers license number.

Phone Number: Enter a valid phone number. This can be designated as the Business Phone Number and not the Caregiver's phone number.

Planned Route: This can be stated as "Received and weighed at PC-00000".

Item Name, Quantity, and Packaged Date: These fields correspond to the specific items and quantities being transferred. The date packaged should be the day that you are entering the items into Metrc. The quantities should be exact and should account only for the product being received.

New Incoming Transfer

Type

Caregiver

Caregiver License Number

Enter Caregiver Number Here

Phone No.

N/A or Licensee Phone #

Planned Route

Please enter that the product was received and verified in this section.

Est. Departure

09/19/2019

today

06

:

35

AM

Est. Arrival

09/19/2019

today

06

:

35

AM

Package # 1

White Widow Seeds

(clear)

Package Date

09/19/2019

today

Quantity

10

Each

(package)

Register Transfer

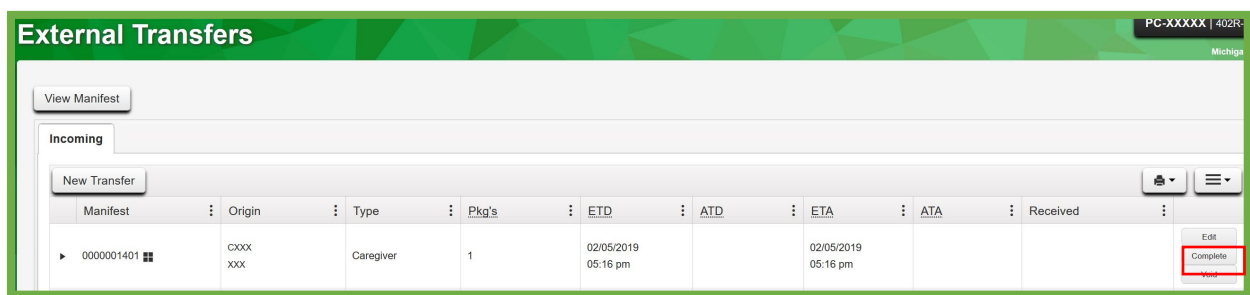
Cancel

Figure 4: Incoming External Transfer

Note: Clicking “Register Transfer” does not create tagged packages in your inventory; you must complete Step 2 (below) to complete the incoming external transfer.

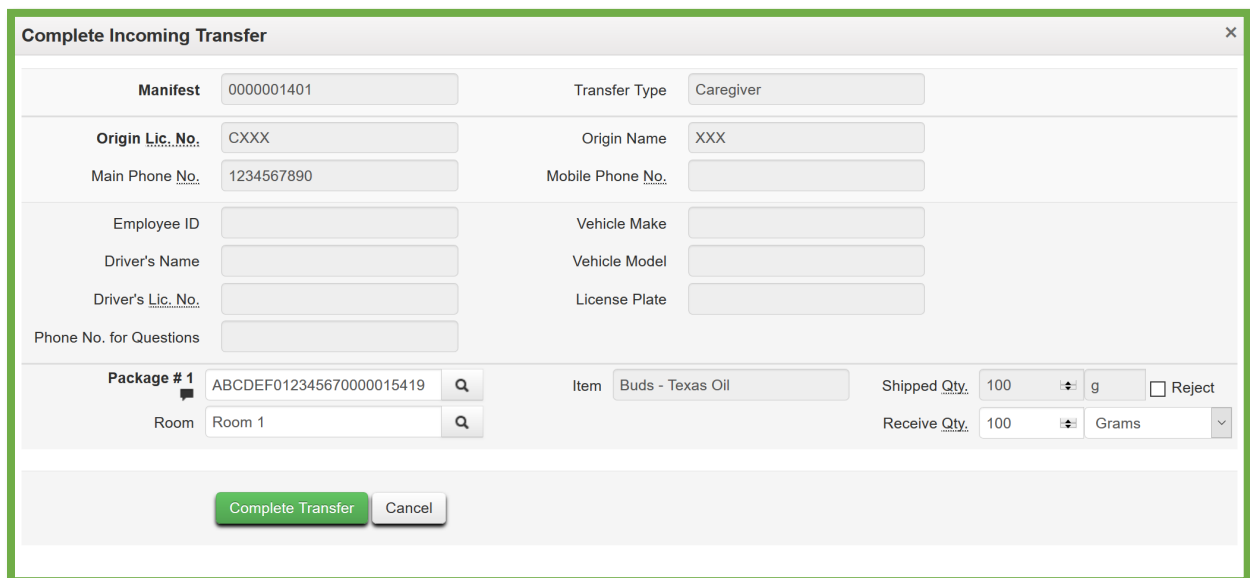
Step 2: Completing the External Transfer

Creating a pending incoming transfer from Step 1 does not immediately associate Metrc package tags with those items. Without completing the transfer, a licensee will not show the proper inventory and will not be in compliance with MRA inventory reconciliation requirements. To create tagged packages, a licensee must complete the pending incoming transfer by clicking the “Complete” button to the far right and then entering the required information. The quantities entered in Step 1 will be auto-populated; you should confirm the accuracy of the quantities and assign a unique Metrc package tag to each item. Licensees must have package tags available to complete this step. The tag assigned to the product in the system should be physically affixed to the associated product. Once the information is accurate and complete, clicking the “Complete Transfer” button will create the packages with the specified quantities in your inventory.



Manifest	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received	
0000001401	CXXX XXX	Caregiver	1	02/05/2019 05:16 pm		02/05/2019 05:16 pm			Edit Complete

Figure 5: Pending Incoming External Transfer



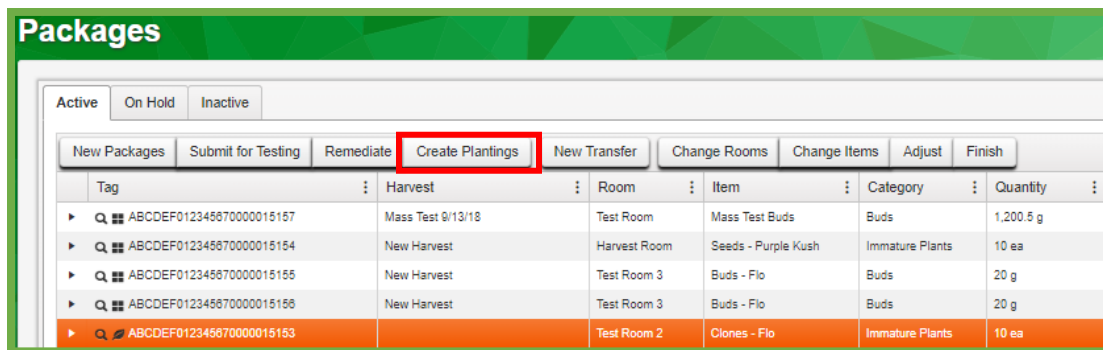
Manifest	0000001401	Transfer Type	Caregiver
Origin Lic. No.	CXXX	Origin Name	XXX
Main Phone No.	1234567890	Mobile Phone No.	
Employee ID		Vehicle Make	
Driver's Name		Vehicle Model	
Driver's Lic. No.		License Plate	
Phone No. for Questions			
Package #1	ABCDEF012345670000015419	Item	Buds - Texas Oil
Room	Room 1	Shipped Qty.	100 g
		Receive Qty.	100 Grams

Figure 6: Completing Incoming External Transfer

Creating Plantings from Packages

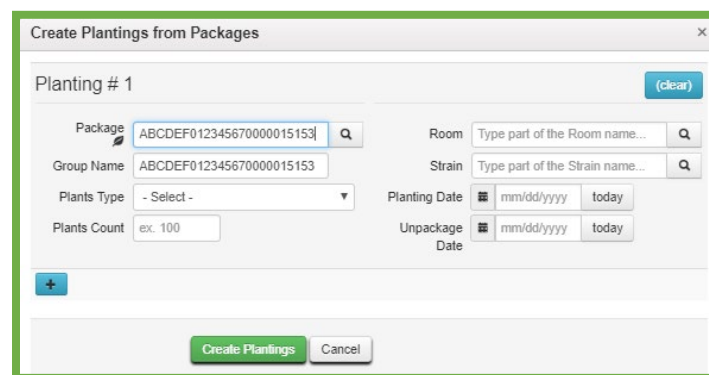
After completing the Incoming External Transfer (as described on the previous page) the packages of seeds, plants, or usable marijuana will appear in your inventory in the Active section under the Packages tab on the navigation bar. For those seeds and plants that are intended for cultivation, you will now need to transition them into the Plants section of Metrc. If you are planning on storing seeds, they would not need to be transitioned directly to the Plants section.

Because plants are required to be received in as a package through the External Transfers, you will need to Create Plantings from each package to move the product into the Plants section. All plants regardless of phase will enter the Plants functionality as an Immature planting.



Packages						
Active On Hold Inactive						
New Packages Submit for Testing Remediate Create Plantings New Transfer Change Rooms Change Items Adjust Finish						
Tag	Harvest	Room	Item	Category	Quantity	
ABCDEF012345670000015157	Mass Test 9/13/18	Test Room	Mass Test Buds	Buds	1,200.5 g	
ABCDEF012345670000015154	New Harvest	Harvest Room	Seeds - Purple Kush	Immature Plants	10 ea	
ABCDEF012345670000015155	New Harvest	Test Room 3	Buds - Flo	Buds	20 g	
ABCDEF012345670000015156	New Harvest	Test Room 3	Buds - Flo	Buds	20 g	
ABCDEF012345670000015153		Test Room 2	Clones - Flo	Immature Plants	10 ea	

Figure 7: Creating a Planting from a Package



Create Plantings from Packages

Planting # 1 (clear)

Package ABCDEF012345670000015153

Room Type part of the Room name...

Group Name ABCDEF012345670000015153

Strain Type part of the Strain name...

Plants Type - Select -

Planting Date mm/dd/yyyy today

Plants Count ex. 100

Unpackage Date mm/dd/yyyy today

+

Create Plantings Cancel

Figure 8: Creating Plantings Dialogue Box

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