

Bulletin Number:	Distribution Date:	Effective Date:
CO_IB_8.9.2024_Voided	08/09/2024	08/09/2024
Transfers, Reject Transfers,		
and Return Manifests		
Contact Point: Metrc	Subject: Voided Manifest of	on Transfer reports, Reject
Support	Packages on Transfers, Cro	eate Return manifests
Reason: To inform licensees	of important updates and be	st practices for transfers.

Greetings,

Metrc is pleased to provide information on the latest system enhancements that are currently available, including:

- Voided Manifests on Transfer reports
- Reject Packages on Transfers
- Create Return Manifests

Please read on for more information.



## Voided Manifest to Transfer Reports

Previously, Transfer Reports would display all transfers without clarifying voided transfers. The Reports Control Panel filters can be used to filter for Transfers. To access the Reports area on the navigational toolbar and select the Control Panel option from the drop down – **see Figure 1**.



Figure 1: Control Panel option in Report area

In the Reports Control Panel, choose the filter of "Transfers" – **see Figure 2.** After this action is taken, a new column will be added to view voided transfers within all 3 Transfer Reports available.



### Figure 2: Transfer Reports options

Next, choose the appropriate report and input the corresponding dates based on the timeline needing to be viewed. Then, select the format that is necessary to be exported



in – PDF, Excel, CSV, or Word. In the example below, exporting a PDF format of the report is shown – **see Figure 3 below.** 

	Transfers
	Origin Facility (optional) Q 2PDF
	- All Origin Facility Types -
	Destination Facility (optional)
	- All Destination Facility Types -
	- All Transfer Types -
	- All Item Categories -
	iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii
	iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii
facility transfers	

Figure 3: Exporting a PDF report

From the exported report, there is now a Voided column visible that shows a "Yes" in the column for any voided transfers – **see Figure 4.** 

¢m	etr	C.								Fror	Transfers n 1/3/2022 To 4/3/2024				
Manifest	Origin Lic.	Origin Facility	Origin Facility Type	Dest. Lic.	Destination Facility	Dest. Facility Type	Туре	Created	Created by User	Received	Received by User	Voided	Package	State	item
0000018201	403-X0001	CO LOFTY ESTABLISHMENT, LLC	OPC	403-X0002	CO LOFTY ESTABLISHMENT, LLC	OPC	Centralized Processing Transfer	5/13/2022	Fisher Anthony	5/13/2022	Fisher Anthony	N-	ABCDEF012345670000012172	Accepted	Buds - AK-47
0000018401	403-X0002	CO LOFTY ESTABLISHMENT, LLC	OPC	402R-X0001	CO LOFTY ESTABLISHMENT, LLC	Retail Store	Transfer	5/18/2022	Jennifer Thomas			No	ABCDEF012345670000013866	Shipped	Buds - GA Red Kush
0000018701	403-X0002	CO LOFTY ESTABLISHMENT, LLC	OPC	402R-X0001	CO LOFTY ESTABLISHMENT, LLC	Retail Store	Affiliated (Decontaminatio n)	6/22/2022	Jennifer Thomas			No	ABCDEF012345670000012230	Shipped	Buds - Metrc Bliss
0000018702	403-X0002	CO LOFTY ESTABLISHMENT, LLC	OPC	402-X0001	CO LOFTY ESTABLISHMENT, LLC	MMC Type 3	Contingency Plan	6/22/2022	Jennifer Thomas			No	ABCDEF012345670000012173	Shipped	Buds - AK-47
0000018901	403-X0002	CO LOFTY ESTABLISHMENT, LLC	OPC	402R-X0001	CO LOFTY ESTABLISHMENT, LLC	Retail Store	Unaffiliated	6/27/2022	METRC INDUSTRY ADMIN			Yes	AE CDEF012345670000014445	Shipped	Buds - Metrc Bliss
0000021802	403-X0001	CO LOFTY ESTABLISHMENT, LLC	OPC	403-X0002	CO LOFTY ESTABLISHMENT, LLC	OPC	Affiliated	1/20/2023	Fisher Anthony			NO	ASCDEF012345670000013887	Shipped	Buds - GA Red Kush
0000022803	403-X0001	CO LOFTY ESTABLISHMENT, LLC	OPC	403-X0002	CO LOFTY ESTABLISHMENT, LLC	OPC	Affiliated (Decontaminatio n)	5/23/2023	Charles Harris	5/23/2023	Charles Harris	No	ABCDEF012345670000013888	Accepted	Buds - GA Red Kush
0000022901	403-X0002	CO LOFTY ESTABLISHMENT, LLC	OPC	403-X0001	CO LOFTY ESTABLISHMENT, LLC	OPC	Affiliated (Decontaminatio n)	5/23/2023	Charles Harris	5/23/2023	Charles Harris	No	ABCDEF012345670000013888	Accepted	Buds - GA Red Kush
0000023201	403-X0001	CO LOFTY ESTABLISHMENT, LLC	OPC	403-X0002	CO LOFTY ESTABLISHMENT, LLC	OPC	Unaffiliated (Decontaminatio n)	6/6/2023	Charles Harris	6/6/2023	Charles Harris	No	ABCDEF012345670000013777	Accepted	Buds - AK-47
													ABCDEF012345670000013888	Accepted	Buds - GA Red Kush

Figure 4: Voided Column within Transfers report





# **Receiving Transfers**

When accepting a transfer in Metrc, some commonly observed errors include:

- Issues relating to the originating manifest that went unnoticed or ignored.
- Receiving different quantities than what was shipped.
- Receiving transfers in Metrc when intending to reject the transfer.

To prevent these types of errors, Metrc recommends the following:

- Leverage another employee to dually verify accuracy prior to the transporter departing the originating facility with any transfers.
- All packages are thoroughly inspected and weighed/counted prior to the transport driver departing the facility.
- Also, leverage another employee to dually verify accuracy prior to the receiving facility accepting any transfers. This will ensure, should any issues be found, the packages can be rejected, and the same manifest can be utilized to send the product being rejected back to the originating facility without the need to create a new manifest.
- As soon as a new transfer manifest is generated in Metrc, that manifest is visible to the destination license **see Figure 5 below**.
  - It is strongly recommended that the destination license view this manifest data in Metrc and confirm that everything looks correct.
- Please note that this does not remove the need to check the physical product upon arrival as well, but it does allow for some mistakes to be corrected prior to transport, such as testing errors, item errors, electronic quantity issues, etc.
  - Ensure the accuracy of the Lab Testing **see Figure 6 below.**
  - When viewing the "Lab Test Batches" tab within the package details, please check that only lab test batches appropriate for that package category are present as well as all required testing has been completed. If the Lab Test Batches data is not correct, the package should be rejected so that it can be corrected by the originating license. If the transfer has been received in error, then the product should be returned physically to the originating facility and returned electronically in Metrc.

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censed Transfers			AU Processor Two   AU
New Transfer View Manifest			
Incoming Inactive Outgoing (1/1) Rejected Inactive			
incoming income conjung (iii) injector income			
Manifest : Origin : Type	i Pkg/s i ETD i ATD	ETA E ATA E Received	I ETRD I ATRD I ETRA I ATRA I
AULG-C-300000X AU Affiliated Transfer	1 06/26/2024 05/04 pm		Rocene
			&•    ¥•    ≡•    ∔
Transporter	Direction	i sq i aq	i ECO i ACO i
AU-ST-00000X AU Secure Transpotter	→ Outbound		
H 🔹 🚺 Page 1 of 1 + H 20 🔻 rows per page			Viewing 1 - 1 (1 total) 🔿 🕇
			( <b>8</b> ·   ▼·   ≡·   ↓
Package I Src. Hs I	Src. Pkg/s I Item I Category I I	tem Strain I Lab Testing I Shipped Oty I Gross	s Wgt I Ship Whsle Price I Received Ghy I Rcy Whsle Price I Status
▲ ■ 1A4FF03000006800000053 Ford's Fire 04.22.24 HB	Ford's Fire Buds F	Ford's Fire TestPassed 98 g 48 g	IVA IVA Shipped

### Figure 5: Navigate to a Specific Package on an Incoming Transfer Manifest

Package	:	Src. H's	: :	Src. Pkg's	Item		Category	:	Item Strain	Lab Testing	Shipped Q	by.	Gross	s Wgt,	Ship Whsle, Price	1	Received Oty	:	Rcv. Whsle. Price	1	Status	
# ABCDEF01234567000	00014605	2019-04-03-Harvest Room-H	1	ABCDEF012345670000012315	Bud	s - Joe's ret	Buds		Joe's Secret	TestPassed					N/A				N/A		Shipped	
Lab Test Batches	Lab Result	s History																				
																		4	-	•	) I I	
Batch Name								:	Test Types Perfor	med			1	Test Types F	tequired				Status		:	
<ul> <li>Microbial Contai</li> </ul>	minant								2					2					Passed (4)			
<ul> <li>Pesticides</li> </ul>									14					14					Passed (14)			
Potency									5				1	5					Passed (6)			
R & D Testing									1					1					Passed (2)			
<ul> <li>Residual Solver</li> </ul>	nts								12					12					Passed (12)			
Potency - Proces	ss Validatio	an J							1					1					Passed (1)			

### Figure 6: View Test Results of a Package on the Incoming Transfer Manifest

Packages should never be received with a quantity different than what was shipped. If there is a difference in quantity, the package should be rejected so that it can be corrected and transferred again. When a package is received with a quantity different than was shipped, that additional product does not go back to the origin license's inventory.

When rejecting a transfer, remember to check the "Reject" box to the right of the package being rejected before clicking the Receive button on the transfer – **see Figure 7 below**. There is no way to reject a package once it has been accepted.

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Receive Licensed Tra	nsfer					×
Manifest	0000026501	Trans	fer Type	Transfer		
Origin Lic. No.	403-X0003	Orig	in Name	CO MISHMASH IMMER	RSION, LLC	
Main Phone No.		Mobile Ph	one <u>No.</u>			
Transporter Lic. No.	403-X0003	Transporter 1	lame	CO MISHMASH IMMERSI	ON, LLC	
Phone No. for Questions	777-777-7777					
Employee ID	X00420	Vehicle	Make	Chevy		
Driver's Name	Snoop Dogg	Vehicle M	lodel	Kush Van		
Driver's Lic. No.	BR549	License	Plate	2FAST		
Package # 1	ABCDEF012345670000015924	Q Item	Buds		Shipped Qty.	2 oz 🔽 Reject
					Reject Reason	Incorrect Quantity ~
					Required Note	Weight incorrect should be 20 oz
	Receive Transfer Cancel					

Figure 7: Reject checkbox and Received Quantity field



## **Reject Packages on Transfers**

Destination facilities have the option to reject packages that contain incorrect information, requiring them to be returned to their origin. To reject a package or packages on a manifest, go to the Transfers area on the navigational toolbar and select the "Licensed" option from the dropdown – **see Figure 8**.



Figure 8: Licensed Transfer option from Transfers area dropdown

From the Licensed Transfers grid, select the "Incoming" tab and then click the "Receive" button on the far right of the incoming transfer – **see Figure 9.** 

etrc 🔯 • Packages   • Transfers   •		Reports   -	Admin	•										<b>h</b> +	- (	Support -	💄 Garza01
ensed Transfers						-									_	CO Lofty I	Rec-Store   40
																	Lok
View Manifest																	
Incoming (28/28) Inactive Outgoing (2/4)	Rejected (2) Inactive																
															٥.	] [ - ]	
Manifest : Origin	: Туре	: Pkg	s	EIQ	ATD	: ETA	: ATA	:	Received	;	ETRD	: AT	RD	: ETRA	:	ATBA	1
► 0000027401 # 403-X0001 CO LOFTY ESTABLISHMENT, LLC				04/02/2024 01:45 pm		04/02/2024 01:45 pm											Receiv
								_		-							

Figure 9: Incoming Transfers

This will open the Receive Licensed Transfer action window. Click the checkbox next to "Reject," select the appropriate rejection reason from the drop-down list, and then add a note to clarify why the package is being rejected – **see Figure 10 below**.

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Manifest	0000026901	Transfer Type	Unaffiliated				
Origin Lic. No.	403-X0001	Origin Name	CO LOFTY ESTABLISH	IMENT, LI			
Main Phone No.		Mobile Phone No.					
Transporter Lic. No.	403-X0001	Transporter Name	CO LOFTY ESTABLISHM	ENT, LI			
Phone No. for Questions	1234567899						
Employee ID	X00420	Vehicle Make	Make				
Driver's Name	Test Driver	Vehicle Model	Model				
Driver's Lic. No.	K12551W12	License Plate	Plate				
Package # 1	ABCDEF012345670000013921 Q	Item DEMO	ITEM: Use By Date - Bud!	Shipped Qty	112	9	Reject
				Reject Reason	- Select -		
	Receive Transfer Cancel			Optional Note	- Select - CO Dept. of Contaminant Incorrect Qu Theft Transfer Erro	Agriculture Testing antity	

Figure 10: Reject and Reject Reasons

In the example below, the package weight exceeded 8 grams. In this case, the correct procedure would be to reject the package, include a Note indicating the weight difference, and then select the green "Receive Transfer" option to reject the package - **see Figure 11.** 

						0			
kage # 1	ABCDEF0123456700000	13921	Q Ite	em DEN	NO ITEM: Use By Date - Bude	Shipped Qty.	112 g	Reject	
						Reject Reason	Incorrect Quantity		~
						Required Note	Package was over 8	grams	
									- 1
	Receive Transfer	ancel							
	ckage # 1	Ckage #1 ABCDEF0123456700000	ckage # 1       ABCDEF012345670000013921         Image: Character in the second sec	Receive Transfer Cancel	ckage #1     ABCDEF012345670000013921     Q     Item     DEI       Receive Transfer     Cancel	ckage #1     ABCDEF012345670000013921     Q     Item     DEMO ITEM: Use By Date - Buds       Receive Transfer     Cancel	ckage #1       ABCDEF012345670000013921       Q       Item       DEMO ITEM: Use By Date - Bud:       Shipped Qty,         Reject Reason       Required Note         Receive Transfer       Cancel	ABCDEF012345670000013921       Q       Item       DEMO ITEM: Use By Date - Bud:       Shipped Qty.       112       g         Reject Reason       Incorrect Quantity         Required Note       Package was over 8	ABCDEF012345670000013921 Item     DEMO ITEM: Use By Date - Bud:     Shipped Qty.     Reject Reason   Incorrect Quantity      Required Note   Package was over 8 grams   Receive Transfer   Cancel

#### Figure 11: Reject Transfer

Packages will remain in the "Incoming" tab of the Licensed Transfers grid with the option to "Unreject" a package, as well as display the time and date the package was rejected. – see Figure 12.

							e	• <b>•</b>	][≡•	+
Received	:	ETRD	:	ATRD	:	ETRA	:	ATRA	:	
07/26/2024 11:50 am										Unreject

Figure 12: "Unreject" Package



# Create Return Manifest

Rejected Transfers can be used to generate a "Return" Manifest. To print the manifest that includes the rejected package(s), access the Transfers area on the navigational toolbar and select the Licensed option from the dropdown – **see Figure 13**.



Figure 13: Licensed Transfer option from Transfers area dropdown

Select the rejected manifest you would like to print to use to return the rejected package(s), then click on the "View Manifest" button – **see Figure 14.** 

ew Transfer Vier	w Man	ifest																									
ncoming (28/28)	Inacti	ve Outgoing (2/4)	Reject	ed (2) Inactive																							
																						L	ė٠	][•	-	≡•	+
Manifest		Origin	:	Туре	:	P.kg's	•	EID	1	AT.D.	E	TA :	t	TA .	:	Received	ET	RD	: 1	ATRD	:	ETRA	1	ATRA			

Figure 14: View Manifest for rejected package

This will open a pdf copy of the Manifest. A key difference to note is the colors that could be displayed on the manifest. The manifest will be updated to highlight accepted packages in green and rejected packages in pink – **see Figure 15**.

1. Package   Rejected	Production Batch No.	Item Name	Quantity
ABCDEF012345670000011250 Lab Test: TestPassed	•	Buds - Joe's Secret (Buds)	Shp: 16 oz
Item Details	Strain: Joe's Secret		
Source Harvest	2019-04-03-Harvest Room-H		
Reject Reason: Incorrect Quantity		Rejection Note: Quantity should be 6oz.	
2. Package   Accepted	Production Batch No.	Item Name	Quantity
ABCDEF012345670000011271 Lab Test: RetestPassed		Joe's Oil 100mg (Concentrate)	Shp: 16 oz Rcv: 16.0000 oz
Item Details			
Source Harvest	2019-04-03-Harvest Room-M		

#### Figure 15: Received package on PDF copy of manifest



Once package(s) have been rejected, the Originating facility can select the Transporters button for the rejected manifest in their rejected tab of the Licensed Transfers grid and update the estimated time of departure and arrival for the return of the rejected package(s) designated when the package will be returned to facility by the selected transported – **See Figure 16**.

coming (1/2) Inactive Outgoing (13	(14) Rejected (1) Inactive									▼•    ≡•    ↓
Manifest I License.No. I	Rejector	i Type i	Ekgis i		I ETA I	ATA i Receiver	I ETRO	I ATRD	I EIBA I AIB	à i
• 0000029101 <b>11</b> 402R-X0001	COLOFTY ESTABLISHMENT, LLC	Transfer	1	06/21/2024 09:01 am	05/21/2024 09:15 am	05/21/202 09:05 am	4			Transporters Receive
									1	
			_				_		1	
		6	1		11	11			1.	
			- 11	<b>T</b> •	$\parallel = \cdot$	- 11 4			1	
			·	1.					1	
							_	1	i -	
		-					_	1		

#### Figure 16: Update Return Manifest

In the Edit Return Transporters action window, the estimated departure date can be updated to reflect the date and time the package will be picked up by the transporter to be returned to the origin facility - **see Figure 17**.

	anne st	000020101			unsier type	manorci				
Originating	Lic. No.	403R-X0001		Destinat	Destination Lic. No.		402R-X0001			
Originatin	g Name	CO LOFTY ESTABLIS	SHMENT, L	I Destir	ation Name	CO LOFTY ESTABL	LI			
Main Ph	one <u>No.</u>			Mair	Phone No.					
Mobile Ph	one <u>No.</u>			Mobile	e Phone No.					
			RETUR	Delivery Direction	GIN					
<u>Est</u> De	eparture	■ 06/21/2024		today	Est Arrival	6/21/2024		today		
		<u>^</u> ^				· ·				
		10 : 09	AM			10 : 09	AM			
Transport # 1	402-X00	001	9	(dear)						
Phone No.	1234567	7890	(use defa	ull)	Layover					
Driver 1	Туре ра	rt of the Driver Name	Q (0	icar) Vehicle 1	Type part of	the vehicle make, mo	Q			
Driver's Name	Snoop D	logg		Vehicle Make	Chevy					
Employee ID	X00420		🔳 Ve	rify Vehicle Model	Kush Van					
river's Lic. No.	BR549			License Plate	2FAST					
O (del	ails)									
(transporter)										
		Save Transporters	Cancel							

Figure 17: Edit Return Transporters action window



The transporter will access the Return Manifest by going to the Transfers area on the navigational toolbar and select the "Hub" option from the dropdown – **see Figure 18**.



Figure 18: Hub Transfer option from Transfers area dropdown

From the Transfers Hub grid, the transporter will see the options to "Accept" or "Edit" the manifest from the Transfer Hub – **see Figure 19.** 



### Figure 19: Accept or Edit option within the Transfer Hub

In the Edit Transporter Info action window, the "Edit" option will provide the same fields to edit as the originating facility. As a transporter, there is the ability to edit the estimated time of departure and estimated time of arrival for the rejected package(s). Once the updated information has been entered, select the "Update Transporter Info" button – **see Figure 20 below**.

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Manifest	0000029104			Transfer Type	Transfer	
iginating Lic. No.	402-X0001			Destination Lic. No.	402R-X0001	
Originating Name	CO LOFTY ESTABLISHMENT, LI			Destination Name	CO LOFTY ESTABLISHMENT, L	.1
Main Phone <u>No</u> ,				Main Phone No.		
Mobile Phone No.				Mobile Phone No.		
		D	elivery Dire	ection		
	REI	TURN	// BACK	TO ORIGIN		
Est. Departure	■ 06/22/2024 📼	today		Est. Arrival	■ 06/22/2024 📼	today
	* *		-		· ·	
	10 : 23 AM				07 : 00 PM	
	v v				• •	
Driver 1	Snoop Dogg	٩	(clear)	Vehicle 1	LVWEED	۹
Driver's Name	Snoop Dogg			Vehicle Make	Chevy	
Employee ID	X00420		Verify	Vehicle Model	Kush Van	
Driver's Lic. No.	BR549			License Plate	LVWEED	
				Planned Route	Left on Main	
• 1 (det	ails)					

Figure 20: Edit Transporter Info action window



## **Metrc resources**

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

#### Contact Metrc Support

By using the new full-service system by navigating to <u>Support.Metrc.com</u>, or from the Metrc System, click Support and navigate to support.metrc.com and it will 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 has been redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Accessing the new Metrc Learn LMS is simple through multiple convenient locations:

#### From within the Metrc system

• Navigate to the Support area on the navigational toolbar and select "Sign up for Training" to register.

#### From the Metrc website

 Navigate to your <u>state's partner page</u> and scroll down to the "Metrc's Training Resources" section to find the link.

Also, save the link as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

#### Access additional resources

In the Metrc system, click on the Support area dropdown on the navigational toolbar and select the appropriate resource, including educational guides, manuals, and more.

Thank you for your continued partnership.