

<b>Bulletin Number:</b> MI_IB_86	<b>Distribution Date:</b> 08/12/2024	<b>Effective Date:</b> Ongoing
<b>Contact Point:</b> Metric Support	<b>Subject:</b> Transfers Best Practices	
<b>Reason:</b> To outline best practices for creating and receiving Transfer Manifests.		

Greetings,

To ensure accuracy and efficiency with Transfers, we are providing best practice guidance around system functionality to help reduce preventable errors that may result in locked product and increased time required for Metric Support case processes.

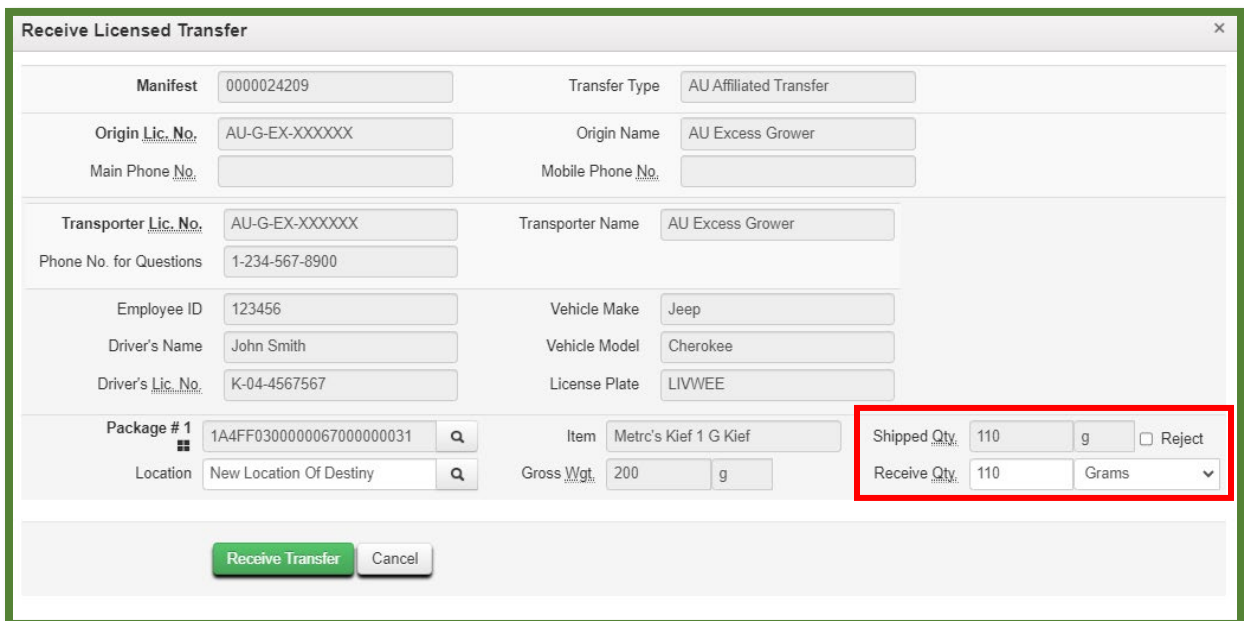
Also, this update includes information regarding new functionality that prompts licensed users to confirm the variance difference of a transfer when it extends beyond the CRA established variance percentage.

Please read on for additional information.

## Transfer Variances

When receiving a transfer manifest, if the received amount input is different than the shipped amount, a confirmation checkbox will appear. This box acts as confirmation that the amount received is correct. This functionality will be active on August 27, 2024.

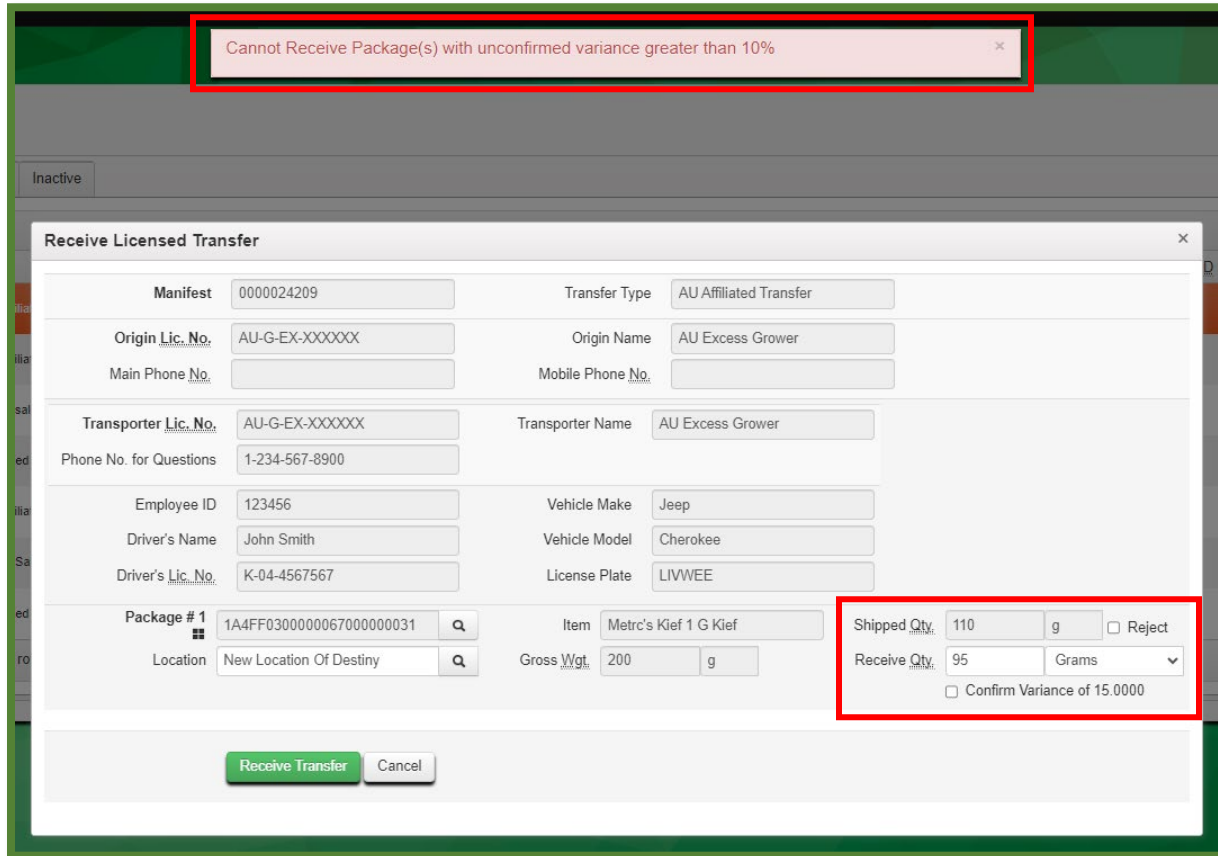
In **Figure 1**, the receive transfer box shows the typical view of this window. If there is no variance, the box will not appear.



Manifest	0000024209	Transfer Type	AU Affiliated Transfer
Origin Lic. No.	AU-G-EX-XXXXXX	Origin Name	AU Excess Grower
Main Phone No.		Mobile Phone No.	
Transporter Lic. No.	AU-G-EX-XXXXXX	Transporter Name	AU Excess Grower
Phone No. for Questions	1-234-567-8900		
Employee ID	123456	Vehicle Make	Jeep
Driver's Name	John Smith	Vehicle Model	Cherokee
Driver's Lic. No.	K-04-4567567	License Plate	LIVWEE
Package # 1	1A4FF0300000067000000031	Item	Metrc's Kief 1 G Kief
Location	New Location Of Destiny	Gross Wgt.	200 g
		Shipped Qty.	110 g <input type="checkbox"/> Reject
		Receive Qty.	110 Grams

**Figure 1: Receive Transfer box with no variance**

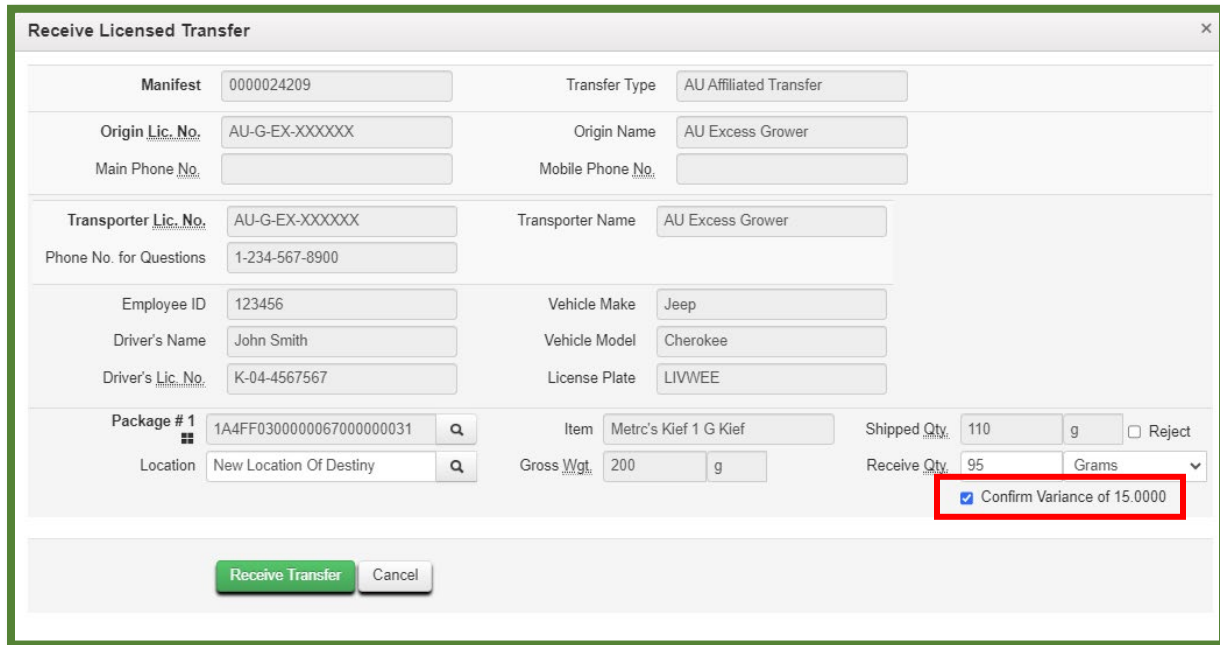
If the amount input into the received box differs from the shipped amount, the confirmation box will appear. When attempting to receive the transfer without checking the confirmation box, an error will be received – **see Figure 2.**



**Figure 2: Error after receiving transfer without checking confirmation box**

**Important note:** If the confirmation box is checked, the transfer can be received even if the weight is inaccurate. Discrepancies between shipped and received weights are monitored at the state level and may generate a referral for an investigation.

**Figure 3** below shows the confirmation box as checked. The transfer pictured can now be received, if desired.



Manifest	0000024209	Transfer Type	AU Affiliated Transfer
Origin Lic. No.	AU-G-EX-XXXXXX	Origin Name	AU Excess Grower
Main Phone No.		Mobile Phone No.	
Transporter Lic. No.	AU-G-EX-XXXXXX	Transporter Name	AU Excess Grower
Phone No. for Questions	1-234-567-8900		
Employee ID	123456	Vehicle Make	Jeep
Driver's Name	John Smith	Vehicle Model	Cherokee
Driver's Lic. No.	K-04-4567567	License Plate	LIVWEE
Package # 1	1A4FF03000000670000000031	Item	Metrc's Kief 1 G Kief
Location	New Location Of Destiny	Shipped Qty.	110 g <input type="checkbox"/> Reject
		Gross Wgt.	200 g
		Receive Qty.	95 Grams
<input checked="" type="checkbox"/> Confirm Variance of 15.0000			

**Figure 3: Checked confirmation box**

**Reminder:** Discrepancies between shipped and received weights are monitored at the state level and may generate a referral for an investigation.

## Outgoing Transfers

When creating a Transfer Manifest in Metrc, it is important to double check each package that is being added to the Manifest. Some common errors made when creating a transfer manifest include:

- Incorrect package placed on manifest
- Incorrect package quantity
- Incorrect wholesale price
- Incorrect item name or category
- Packages physically left off transfer manifest

The example manifest below highlights a few key areas on the manifest that the list above references – **see Figure 4.**

<b>1. Destination</b>		AU Processor	<b>Destination Phone No.</b>	
<b>Destination License Number</b>	AU-P-XXXXXX	<b>Date and Approx. Time of Departure</b>		3/13/2024 7:26 AM
<b>Address of Destination</b>		<b>Date and Approx. Time of Arrival</b>		3/13/2024 8:26 AM
		<b>Date/Time Received</b>		
		<b>Route to be Traveled</b>		
Over the river and through the woods; to grandmother's house we go.				
<b>1. Outbound Transporter</b>	AU Secure Transporter	<b>No Layover Scheduled</b>		
<b>Transporter License Number</b>	AU-ST-XXXXXX			
<b>Address of Transporter</b>				
<b>Contact Phone No. for Inquiries:</b> 123-456-12345				
<b>Name of Person Transporting</b>	Dan Campbell	<b>Employee ID of Driver</b>	12345	
<b>State Driver's License No.</b>	MI 1	<b>Signature of Person Transporting</b>		
<b>Make, Model, License Plate No.</b>	Ford Lion Mobile DETR01T	<b>Leg of Layover Trip</b>		
<b>1. Package   Shipped</b>	<b>Production Batch No.</b>	<b>Item Name</b>	<b>Quantity</b>	
1A4FF0100000071000000023 Lab Test: NotRequired		White Widow Moms (Wet Whole Plants (each))	Shp: 3 ea GWT: 2.0000 g	
<b>Item Details</b>	Strain: White Widow			

**Figure 4: Transfer Manifest**

Prior to leaving the originating facility, it is beneficial to ensure:

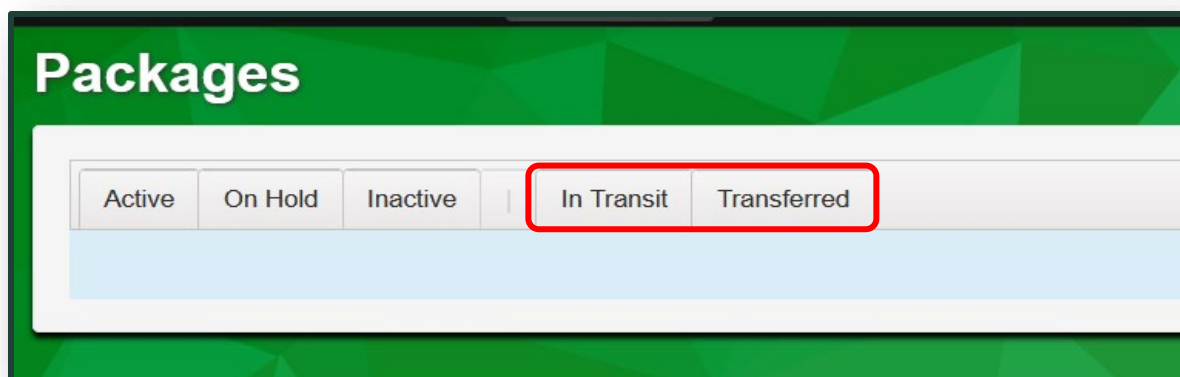
- Packages are created properly – correct item, quantity, package tag numbers
- The price listed on the transfer, if applicable, is correct
- The correct packages are listed on the transfer and are all physically packed/present
- There are no sales associated with any of the included packages
  - If a sale has been completed for a package and the sale needs to be edited but the package has been transferred, the ability to edit the sale would not be available.
  - Packages with sales should never be transferred out of the facility that completed the sale. If the remaining product in a package needs to be transferred, the remaining quantity should be repackaged onto a new package tag and the new package should be transferred to the other facility, as described in [Michigan Industry Bulletin 44](#).

**Reminder:** Once packages are placed on a transfer manifest, they will no longer be visible within the Active Packages grid in Metrc. To view which Packages are on a Manifest, ones that have previously been transferred, refer to the In Transit or the Transferred tab of the Packages grid – **see Figure 5**.

The difference between the two tabs are as follows:

- **In Transit** - This tab displays the package(s) that are currently on a transfer manifest and have not been received by the receiving facility.
- **Transferred:** This tab displays the package(s) that have been transferred out of the facility and are currently in the inventory of another licensed facility.

Additional information on the Transferred Packages tab can be found in [Michigan Industry Bulletin 82](#).



**Figure 5: In Transit and Transferred Tab in the Packages Grid**

## Available Transfer Types

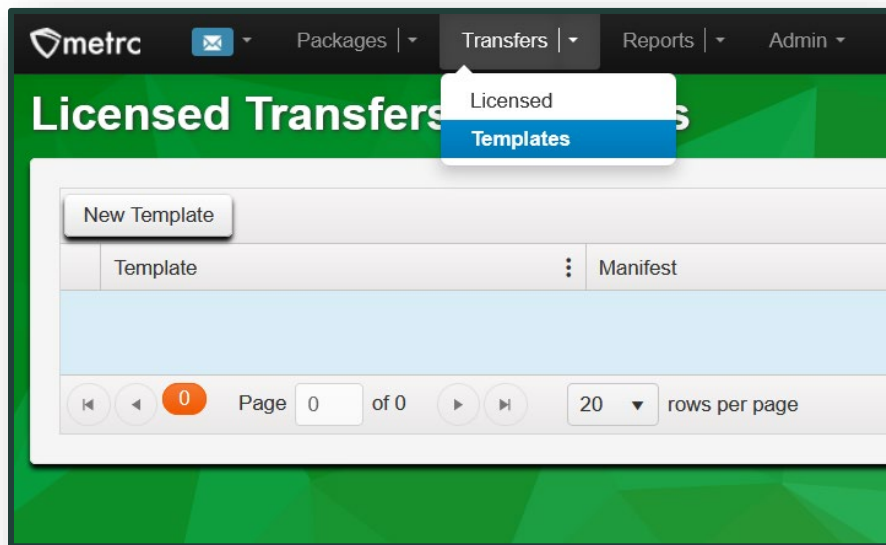
Below is a list of transfer types that are available to use when creating a licensed transfer within Metrc:

- **Adult-Use (AU) Affiliated Transfer** – Used when transferring to an affiliated business under the same ownership.
- **Grow to Grow between Medical (Med) and AU** – Used by Growers to transfer passed or untested inventory to an equivalent adult-use establishment.
- **Immature Plants Between Med and AU** – Used by Growers when transferring packages of immature plants to equivalent adult-use licenses.
- **Infusion Transfer** – Used when transferring to a Processing license to process material for your business or when no upfront price is negotiated.
- **Med Affiliated Transfer** – Used when transferring to an affiliated business under the same ownership.
- **Microbusiness Transfer** – Used by Growers to transfer packages of immature plants to Microbusiness licenses. This transfer will have a wholesale dollar amount associated with it.
- **PC and Retailer between Med and AU** – Used by Provisioning centers to transfer passed inventory to their equivalent license.
- **Processor to Processor between Med and AU** – Used by Processors to transfer passed inventory to their equivalent license.
- **Testing Transfer (to SCF)** – Used when sending test samples to a testing facility.
- **Trade Sample Transfer** – Used when transferring trade samples to other businesses to try the products.
- **Wholesale Transfer** – Used when sending product to an unaffiliated license and money is being exchanged for the products.

## Transfer Templates

Transfer templates are a great option for those who transfer to the same licenses regularly. Here, transfer templates can be created and saved for transfers to a specific license.

To create a Transfer Template, access the Transfers area on the navigational toolbar and select the Templates option from the drop down. Once on the Licensed Transfers Templates grid, select the New Template button – **see Figure 6.**



**Figure 6: Transfer Templates**

The Transfer Template should be completed with the license number, planned route, type of transfer, and driver information filled in, for use when needed. When using a preexisting transfer template, only the packages and ETD (“Estimated Time of Delivery”) and ETA (“Estimated Time of Arrival”) need to be completed. Multiple templates can be created and edited as needed.

**Please note:** Creating and editing transfer templates is available through the Metrc API, but creating the transfer will need to be completed within the Metrc system.



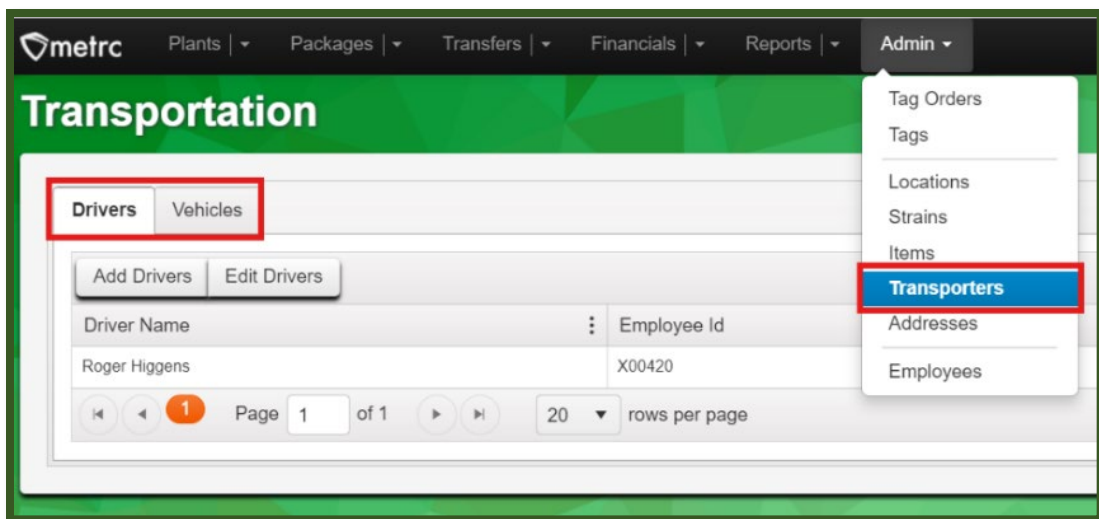
## Vehicle and Driver Data

Metrc is constantly working to increase efficiency and ease of use within the system. There are two ways to access functionality:

### 1. Ability to save commonly used transporter information

The ability to save commonly used transportation vehicles and drivers' information is helpful so that this information does not need to be manually entered each time a transfer manifest is created.

To add drivers or vehicles, access the Admin area on the navigational toolbar, select the Transporters option from the drop down, then click the Drivers or Vehicles tab – **see Figure 7.**

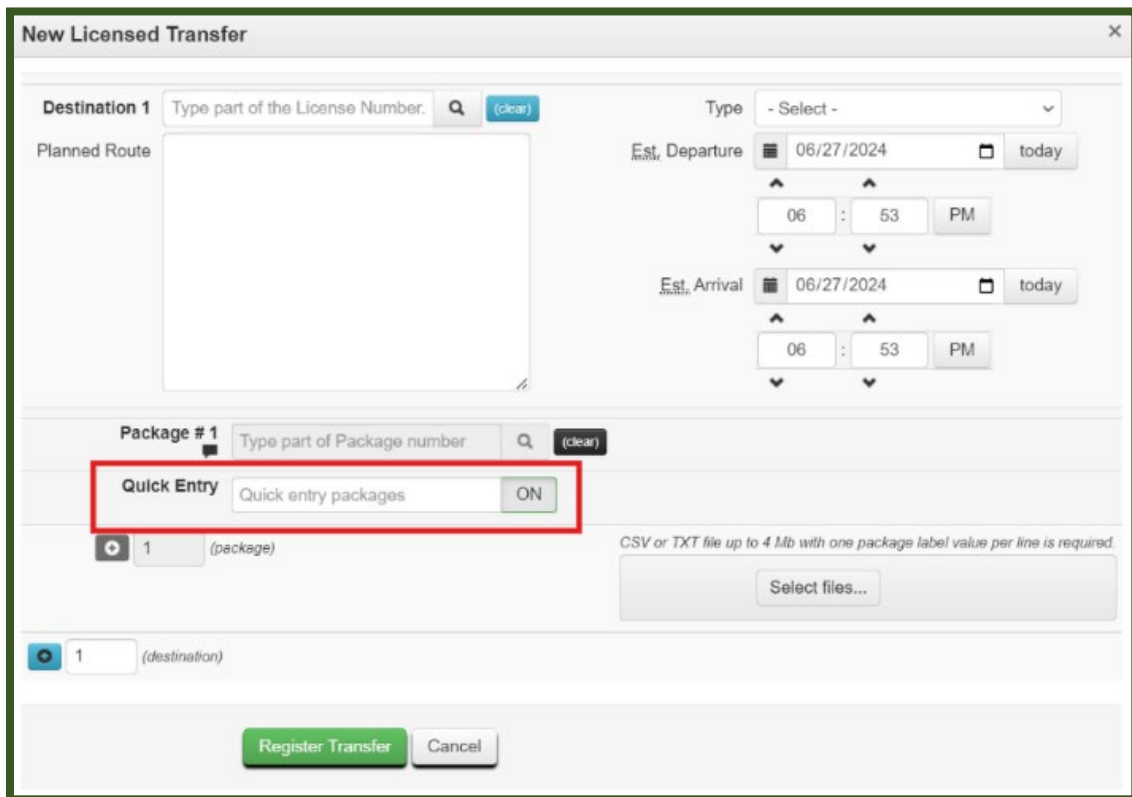


**Figure 7: Driver and Vehicle Data Entry**

## 2. Quick Entry and CSV Upload

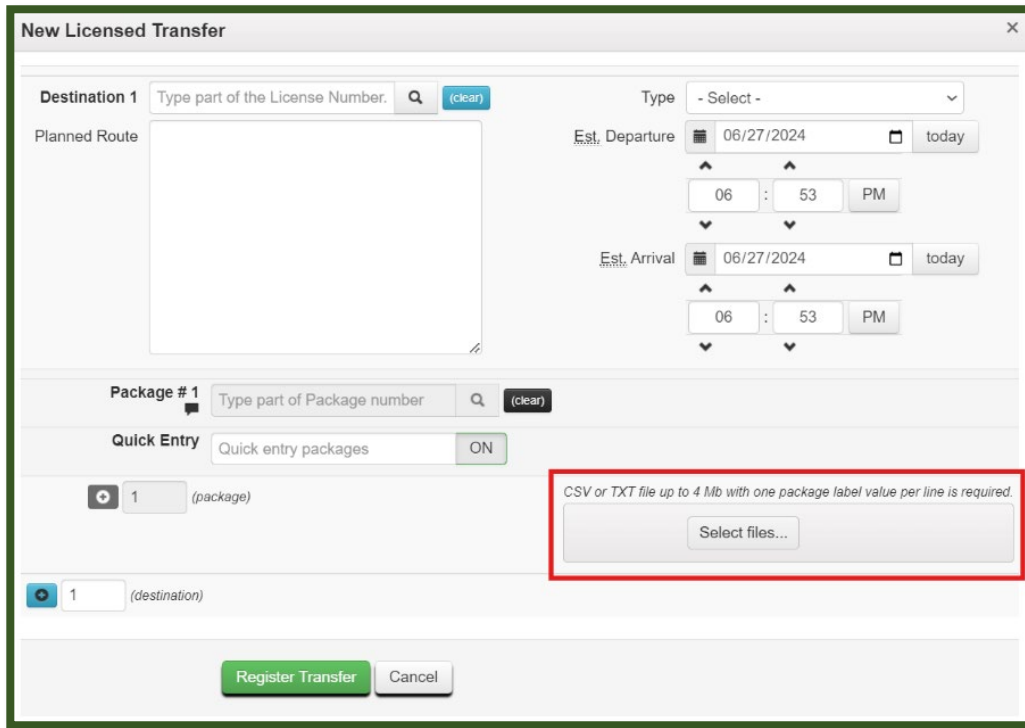
Additional efficiencies for creating transfer manifests include use of the Quick Entry and CSV Upload features.

- **Quick Entry** - This feature allows for a barcode scanner to be used to add packages to a manifest in Metrc. More information regarding this functionality can be found in [Michigan Bulletin 73](#). When using this feature, be sure that the Quick Entry is toggled “On” for the manifest. If it reads as “Off”, simply click the “Off” button so that it toggles to “On” – **see Figure 8**.



**Figure 8: Quick Entry functionality**

- **CSV Upload** - This functionality offers the ability to upload a simple CSV file to add packages to the manifest – **see Figure 9**.



The screenshot shows a web application window titled "New Licensed Transfer". It contains several input fields and controls:

- Destination 1:** A text input field with the placeholder "Type part of the License Number.", a search icon, and a "(clear)" button.
- Planned Route:** A large empty text area.
- Type:** A dropdown menu currently set to "- Select -".
- Est. Departure:** A date and time selector showing "06/27/2024" and "today", with time fields for "06 : 53 PM".
- Est. Arrival:** A date and time selector showing "06/27/2024" and "today", with time fields for "06 : 53 PM".
- Package # 1:** A text input field with the placeholder "Type part of Package number.", a search icon, and a "(clear)" button.
- Quick Entry:** A text input field with the placeholder "Quick entry packages" and an "ON" toggle button.
- Package List:** A list with one item: "1 (package)".
- Destination List:** A list with one item: "1 (destination)".
- File Upload:** A red-bordered box containing the text "CSV or TXT file up to 4 Mb with one package label value per line is required." and a "Select files..." button.
- Buttons:** "Register Transfer" (green) and "Cancel" (grey) buttons at the bottom.

**Figure 9: CSV Upload to add packages to a transfer manifest**

**Please note:** Taking this action will only add the package labels. If wholesale pricing needs to be added, that must still be done manually within the transfer manifest creation window.

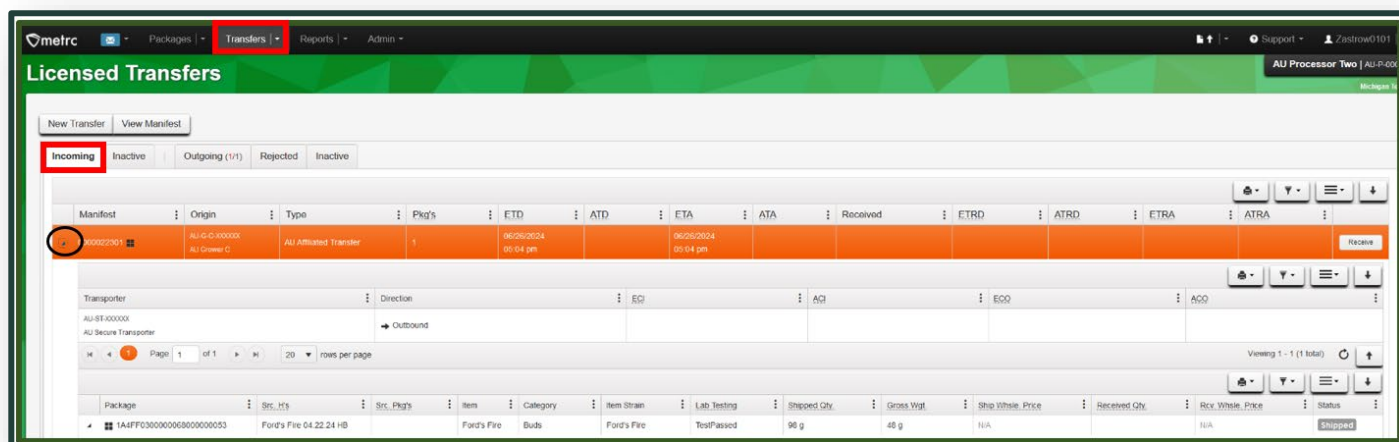
## Receiving Transfers

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

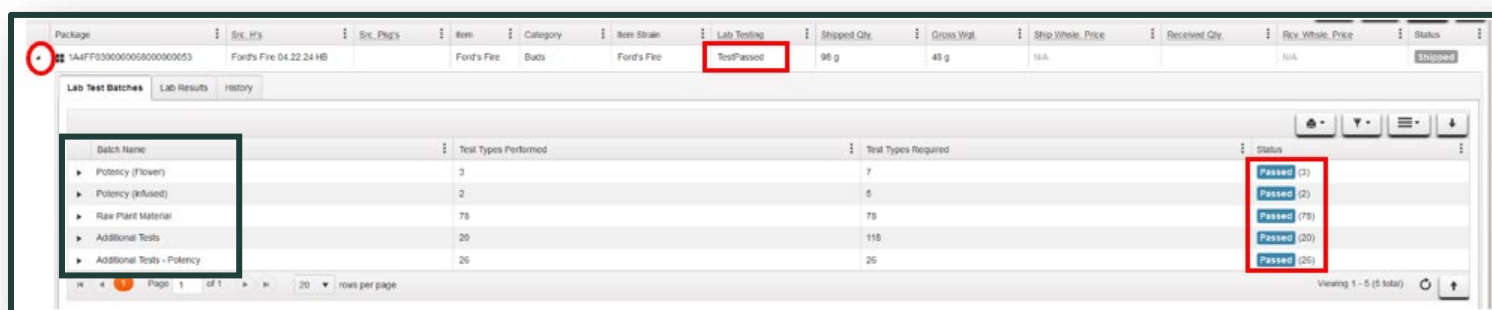
- Issues relating to the originating manifest that went unnoticed or ignored.
- Receiving different quantities than what was shipped.
- Receiving transfers in Metric when intending to reject the transfer.

To prevent these types of errors, the following is recommended:

- All packages should be thoroughly inspected and weighed/counted prior to the transport driver departing the facility.
- If possible, leverage another employee to dually verify accuracy prior to accepting transfers.
- Always receive the transfer in Metric prior to the transporter leaving the facility. This will ensure that, should any issues be found, the packages can be rejected both physically and in Metric without delay.
- As soon as a new transfer manifest is generated in Metric, that manifest is visible to the destination license.
  - It is strongly recommended that the destination license view this manifest data in Metric and confirm that everything looks correct.
    - **Please note:** This does not remove the need to check the physical product upon arrival, however, it does allow for some mistakes to be corrected prior to shipping, such as testing errors, item errors, or electronic quantity issues.
- Ensure accuracy of Lab Testing – **see Figures 10 and 11 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. For example, a package of concentrates should not have Lab Test Batch data for Raw Plant Material. If the Test Batch data is not correct, the package should be rejected so that it can be returned physically to the shipper and in Metric so it can be corrected by the sending facility.



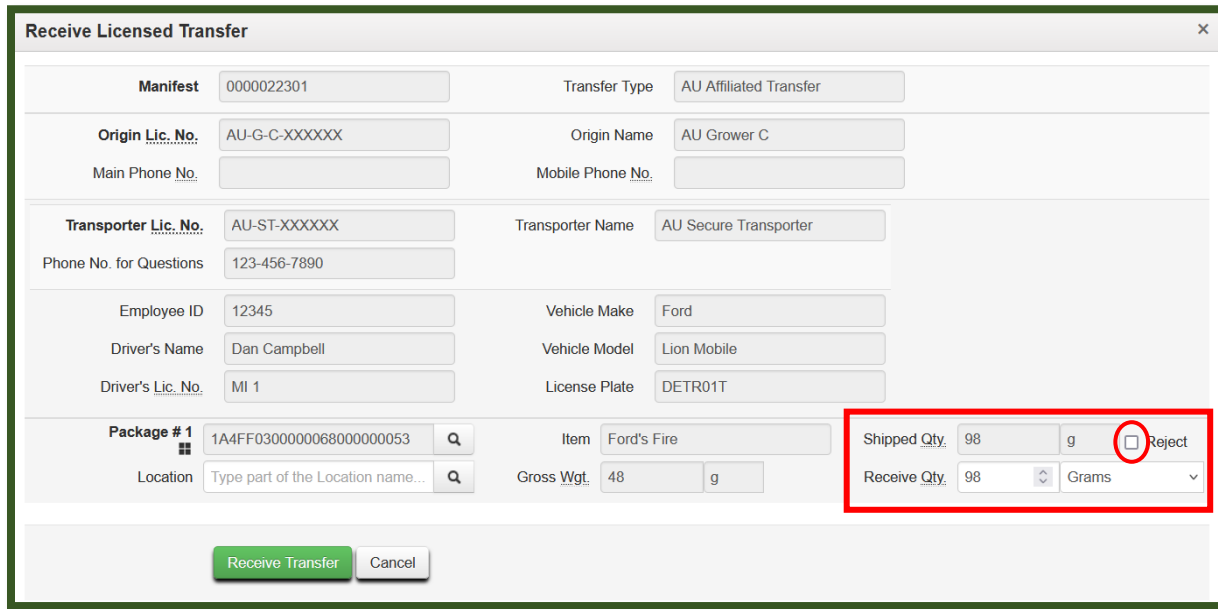
**Figure 10: Navigate to a Specific Package on an Incoming Transfer Manifest**



**Figure 11: View Test Results of a Package on the Incoming Transfer Manifest**

Packages should not be received at a quantity different than was shipped. If there is a difference in quantity of a package, that package should be rejected so that it can be returned, corrected, and reshipped. When a package is received with a quantity different than when it 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 Shipped Qty. package being rejected before clicking the Receive button on the transfer – **see Figure 12**. There is no way to undo the accidental acceptance of a package.



**Figure 12: Reject checkbox and Received Quantity field**

Once a Transfer Manifest is received in Metrc, the PDF of the transfer (found by clicking the View Manifest button within the incoming and/or outgoing Transfers grids in Metrc) will update to a status of accepted packages in green or rejected packages in pink – see **Figures 13 and 14**.

1. Package   Accepted	Production Batch No.	Item Name	Quantity
1A4FF030000068000000053 Lab Test: TestPassed		Ford's Fire (Buds)	Shp: 98 g Rcv: 98.0000 g GWT: 48.0000 g
<b>Item Details</b>	Strain: Ford's Fire		
<b>Source Harvest</b>	Ford's Fire 04.22.24 HB		

**Figure 13: Received package on PDF copy of manifest**

1. Package   Rejected	Production Batch No.	Item Name	Quantity
1A4FF01000000710000000023 Lab Test: NotRequired		White Widow Moms (Wet Whole Plants (each))	Shp: 3 ea GWT: 2.0000 g
<b>Item Details</b>	Strain: White Widow		
<b>Reject Reason:</b> Tampered Package	<b>Rejection Note:</b> No thank you		

**Figure 14: Rejected package on PDF copy of manifest**

### 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 – Service Cloud – 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 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 was recently redesigned 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, including educational guides, manuals, and more.

Thank you for your continued partnership.