

Bulletin Number:	Distribution Date:	Effective Date:						
OH_IB_64	11/25/2024	12/02/2024						
Contact Point:	Subject: Closing Open-Source Plants & Transfer Typ							
Metrc Support	Updates							
Reason: To provide important clones and hemp ingredients f transfer type.	updates about the DCC pro rom external sources, along	ocess for tracking seeds, y with notification of a new						

Greetings,

Beginning December 2, 2024, all Metrc packages will be required to be created from a source that exists in Metrc, with the exception of packages created using a compliant External Transfer process, as detailed in this guidance.

The Division of Cannabis Control ("DCC" or "Division") will be disabling the functionality within Metrc that allows the creation of a package without a source, and establishing a process whereby a licensee may request to activate their permissions in Metrc to accept specified External Transfers using a compliant procedure that ensures appropriate tracking. This bulletin will include information on the changes and guidance on how to properly use the External Transfer functionality.

This bulletin also includes information regarding a new licensed transfer type "Seeds/Clones Licensed Transfer" to be used for transferring seeds and clones between licensed cultivators in Ohio.

Please read on for additional information.



CREATING METRC PACKAGES WITHOUT A SOURCE/EXTERNAL TRANSFERS

Permissions and Processes for External Transfers

Please note that for the DCC to activate a licensee's permissions for External Transfers in Metrc, all steps detailed in the section "Activating Permissions for External Transfers" must first be completed.

The External Transfer process is like the current process for creating transfer manifests, except that the receiving licensee will create the manifest, and then assign tags to the product upon completing the transfer. The External Transfer functionality will allow for the following:

- 1. The ability to correctly record seeds and clones that are being brought into cultivation facilities from sources outside of Metrc.
- 2. The ability to correctly record hemp-derived ingredients being brought into processing facilities from sources outside of Metrc.

Activating Permissions for External Transfers:

In order to activate permissions to use Metrc's External Transfer function, licensees must first complete the actions below:

- 1. Prepare a written Standard Operating Procedure (SOP) that includes the requirements and steps for incoming External Transfers within Metrc (see below). The SOP must include all the details necessary for responsible employees to understand the requirements and correctly complete all steps.
- Submit a <u>Change of Operations</u> request to <u>DCCCompliance@com.ohio.gov</u>, requesting approval to use the external incoming transfer process. The DCC may do any of the following:
 - Approve the request
 - Deny the request
 - Request changes to the SOP
 - Request additional information or clarification
- 3. Upon approval, the licensee will be notified that the permission to use the External Transfer functionality has been activated within Metrc.
- 4. Train all responsible employees on the contents of the final SOP and maintain all training records pursuant to Division rules.

Before getting started:

Before bringing an external product into the Metrc account, the licensee must create Metrc Items for the products based on the product type. All strain names must be approved by the DCC.

At this time, the only external products allowed are seeds and clones, and hemp-derived ingredients, and <u>all seeds, clones, and hemp-derived ingredients must be tracked in Metrc</u>.



Additional product types may be approved by the DCC in the future.

- 1. External Seeds and Clones:
 - Metrc Product Category is "Seeds" or "Clones" -:
 - Available for cultivation only. Processors may not intake seeds or clones.
 - Item name must be in the following format:
 - "External Seeds- Strain-Date," or "External Clones- Strain-Date" where "Strain" is the approved strain name of the seeds or clones and "Date" is the date received in the format YYYYMMDD.
 - Example: "External Seeds- Blue Dream-20240925"
 - If obtained from another cannabis licensee within the State of Ohio, supporting documentation must be maintained by the licensee.
 - The Licensed Transfer function must be used in Metrc
 - No more than 100 seeds per Metrc package. Licensees may bring in more than 100 seeds per shipment but must allocate them into Metrc packages containing no more than 100 seeds each.
- 2. <u>Hemp-Derived Ingredients</u>:
 - Metrc Product category: "Hemp-Derived Ingredient- External Source"
 - Available for processors only. Cultivators may not intake hemp-derived ingredients.
 - Item name must be in the following format: "Hemp Ingredient- NAME-Date", where "NAME" is the type of product it is (such as "CBD Isolate"), and "Date" is the date received in the format YYYYMMDD.
 - Example: "Hemp Ingredient- CBD Isolate-20240925"
 - Must be obtained from a vendor that is licensed and regulated by the state in which they operate. Please note that the DCC may maintain a list of approved vendors for hemp ingredients in the future.



Creating Incoming External Transfers:

 First, you must create the necessary items. In the Admin area, go to the items grid and select the "Add Items" button. This will prompt an action window to input the item name, type, and any additional required fields. Create a Metrc Item for each item type that you are permitted to use in your license. Once you have verified that the information for the item is correct, select the "Create Item" button to add it to the list of items available when creating the external transfer. See screenshot below.

Add	l Ite	em	s					×
Ite	m	#	1				(cle	ear)
		٢	lar	ne	Hemp Ingredient- CBD Isolate- 20	Unit of Measure	Grams	•
	C	Cate	ego	ory	Hemp-Derived Ingredient- External :	Description	Hemp Ingredient- CBD Isolate- 20241119	
+	1	~	>	(pro	duct photo)			
+	1	1		(lab	el photo)			
+	1	~	;	(pa	ckaging photo)			
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Ce in	hy is ertain all of crea	the fitte	m (Cate	multi-Facility create such as that availab egories require the selection of a pre-existing led Facilities would be convoluted and comp multiple Facilities at the same time	le in Employees, Strain 3 Strain. Verifying and in lex to inform. For this re	ns, and Locations? forming that the specified Strain exists aason we have opted to not add the ability	,
					Create Items Cancel	J		

Figure 1a: Adding a new item for hemp



Add Items				×
Template		Unit of Measure	- Select -	× •
Category	- Select - 🗸 🗸			
Item # 1				-
Name	External Seeds- Blue Dream- 202	Unit of Measure	Each	~
Category	Seeds ~	Strain	Blue Dream	~
+ 1 0 (pro	oduct photo)			
+ 1 0 (lab	el photo)			
+ 1 0 (pa	ckaging photo)			
+ 1 🗘 (ing	redient)			
Item # 2				-
Name	External Clones- Blue Dream- 20	Unit of Measure	Each	~
Category	Clones ~	Strain	Blue Dream	~
+ 1 0 (pro	duct photo)			
+ 1 🗘 (lab	el photo)			
+ 1 🗘 (pa	ckaging photo)			
+ 1 0 (ing	redient)			
+ 1 0	item)			
Why is there no Certain Item Cate in all of the select to create Items in	multi-Facility create such as that available in Em gories require the selection of a pre-existing Strain. ed Facilities would be convoluted and complex to in multiple Facilities at the same time.	ployees, Strains, an Verifying and informir form. For this reason	Id Locations? Ig that the specified Strain exists we have opted to not add the ability	
	Create Items Cancel			

Figure 1b: Adding a new item for external seeds/clones



2. To create the External Incoming Transfer, under the "Transfers" tab select "External." <u>This option will not be available until you have received approval from the DCC to intake seeds.</u> <u>clones, or hemp-derived ingredients.</u> – see **Figure 2**

🕈 💌 🕶 Packages -	Transfers -	Financi
External Transfers	Licensed Templates	
View Manifest	External	_
Incoming Inactive		
		_

Figure 2: External transfers option in transfers navigation menu

3. Select the Incoming tab and click New Transfer - Figure 3

≎metro	. 🖂 -	Package	s +	Transfers -		Financi	als +
Exte	rnal Tr	ansfe	ers				
View I	Manifest ming Inactiv ew Transfer	ve					
	Manifest	:	Inv. Nk	ſ	÷	Origin	
		Page 0	of 0			20 🔻	rows pe

Figure 3: Incoming tab in external transfers area



- 4. Fill in the available fields to create your incoming external transfer.
 - a) Select the transfer type that applies to the product. The options are:
 - i. Seeds/Clones External Inventory Transfer
 - ii. Hemp Ingredients Only External Inventory Transfer
 - b) Phone number
 - c) Planned Route
 - i. Briefly indicate the product type. For example, "External Seeds Intake" or "External Hemp-Derived Ingredient Intake."
 - d) Estimated Departure and Arrival Times
 - e) Invoice Number, if applicable.
 - f) In the package field, use the magnifying glass to select the item name that was created for this transfer and then complete the additional packaging fields – Figures 4a and 4b.

Type Hemp Ingredients Only External In Phone No. 123-456-7890 Planned Route Hemp Ingredients- CRD Isolate- 20241119	
Phone No. 123-456-7890 Planned Route Hemp Ingredients- CRD Isolate- 20241119 Invoice Number Enter th	
Planned Route Hemp Ingredients- CRD Isolate- 20241119	
	nvoice Number
Est. Departure 🗰 11/	/2024 🗖 today
·	•
11	38 AM
÷	•
Est Arrival 🗰 11/	/2024 🗖 today
	►
	AM
Package # 1 M00000018802: Hemp Ingredien: Q (clear) Package Date 🗰 11/	/2024 🗖 today
Quantity 1234 Grams ~	
1 (package)	
De iter ter de Const	
Register Transfer Cancel	

Figure 4a: Incoming external transfer action window, hemp

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New Incoming	Transfer
Туре	Seeds/Clones External Transfer
Phone No.	123-456-7890
Planned Route	99 clones- Blue Dream External Invoice Number Enter the Invoice Number
	99 seeds- Blue Dream External Est. Departure 🗎 11/22/2024 🗂 today
	12 : 36 PM
	Est. Arrival 🗰 11/22/2024 🗂 today
	12 : 53 PM
Pack	age # 1 M00000019301: External Clones Q O Package Date 🖬 11/22/2024 📋 today
(Quantity 99 C Each ~
Pack	age # 2 M0000018801: External Seeds- Q 🖸 Package Date 🗎 11/22/2024 🗂 today
(Quantity 99 C Each ~
0 1	(package)
	Register Transfer Cancel

Figure 4b: Incoming external transfer action window, seeds/clones

5. Once the external transfer data entry is complete, be sure to select the "Register Transfer" button.



Receiving an Incoming External Transfer

 Once the incoming External Transfer has been created, you must receive the transfer and assign Metrc tags. To receive the transfer, navigate to the Incoming external transfer area and use the "Complete" button at the far right-hand side of the appropriate transfer line – Figure 5a and 5b.

ternal Transfers				1					OH Med Processor A 030-X0
				<u> </u>					Ohio Tes
/iew Manifest									
Incoming Inactive Outgoing Inactive									
New Transfer								e	· · · = · +
Manifest : Inv. Nbr : Origin	: Туре	Pkg's :	ETD : ATD	ETA :	ATA :	Received :	ETRD : A	TRD : ETRA	: ATRA :
► 0000009701 									Edit Complete Void
	20 v rows per page							View	wing 1 - 1 (1 total) 💍 🕇

Figure 5a: Incoming tab in external transfers area, hemp

metrc	× 🖂	Plants -	Packages -	Transfers -	Reports	← Admin	*						∎↑∣≁	🤊 Support 👻	X00026
xter	nal Tra	ansfers										~~~		OH Cultivator	Level II A 040-X0
	indi int														Ohio Tes
View M	lanifect														
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Incom	ning Inactive	e Outgo	ing Inactive	Э											
(Nor	Transfer												(.	1 - 1	- 1(-)
New	Viransier												8		
1	Manifest :	Inv. Nbr	Origin	Туре	Pkg's	ETD :	ATD	ETA :	ATA :	Received	ETRD	ATRD	ETRA	: ATRA	:
				External Licensed		10/29/2024		10/29/2024							Edit
► C	0000009402	ABCDE123		Transfer	1	03:23 pm		03:43 pm							Complete
															- Ju
M	• • Pi	age 1 of	1 (Þ)(H)	20 v row	s per page								View	ing 1 - 1 (1 total)	

Figure 5b: Incoming tab in external transfers area, seeds/clones

- 2. Once the "complete" button has been selected, an action window is prompted to assign Metrc tags to the incoming packages.
- 3. Although there is currently not a limit on the quantity of seeds that can be received in one shipment, **you may allocate up to 100 seeds per Metrc** tag. Shipments received with greater than 100 seeds will require multiple Metrc tags.
- 4. Use the magnifying glass to select an available package tag to assign to your new inventory, fill in the rest of the package information and click the "Complete Transfer"



button once the tags have also been physically applied to your package(s). – **Figure 6a** and 6b.

Complete Incoming Tr	ansfer							×
Manifest	0000009902	Trans	sfer Type	Hemp Ingredients Only E	xternal I			
Origin <u>Lic. No.</u>		Orig	in Name					
Main Phone <u>No.</u>	123-456-7890	Mobile Ph	none <u>No.</u>					
Phone No. for Questions								
Employee ID		Vehicle	Make					
Driver's Name		Vehicle I	Vodel					
Driver's <u>Lic. No</u> ,		License	Plate					
Package # 1	ABCDEF012345670000014976	Q Item	M000000	18802: Hemp Ingredien	Shipped <u>Qty.</u>	1234	g	Reject
Location	Shellie's Inventory Stock Room	٩			Receive <u>Qty.</u>	1234	Grams	s ~
-								_
	Complete Transfer Cancel							
			_			_	_	

Figure 6a: Completing incoming external transfer, hemp

Manifest	0000010301		Trans	fer Type See	ds/Clones External T	ransfer				
Origin Lic. No.			Origi	in Name						
Main Phone No.	123-456-7890		Mobile Ph	none <u>No.</u>						
none No. for Questions										
Employee ID			Vehicle Make							
Driver's Name			Vehicle Model							
Driver's Lic. No.			License Plate							
Template										Reject
Tag Sequence	ABCDEF012345670000015742	۹ 🖌								
Location	Shellie's Inventory Stock Room	۹ 🗸								
Package # 1	ABCDEF012345670000015742	۹	Item	M00000019301	: External Clones-	Shipped Qty.	99		ea	Reject
Location	Shellie's Inventory Stock Room	۹				Receive Qty.	99	\$	Each	~
Package # 2	ABCDEF012345670000015743	۹	Item	M00000018801	: External Seeds-	Shipped Qty.	99		ea	Reject
Location	Shellie's Inventory Stock Room	Q				Receive Qty.	99	0	Each	~

Figure 6b: Completing incoming external transfer, seeds/clones



New Licensed Transfer Type:

A new licensed transfer type has been added in Ohio to allow for transfers of seeds and clones between Ohio cultivations. The new license type is "Seeds/Clones Licensed Transfer."

When creating a new licensed transfer, cultivators only will now see the new transfer type listed in the "type" dropdown – see **Figure 7**.

	040-X00	01	Q	(clear)		Туре	Seeds/Clones Licensed Transfer	~
anned Route	Licensed Seeds/Clones Transfer					Invoice Number	Enter the Invoice Number	
						Est. Departure	iii 11/22/2024 iii to	day
							^ ^	
							02 : 07 PM	
						Est. Arrival	■ 11/22/2024 🗂 to	dav
				//			^ ^	
				///.			02 : 27 PM	
							* *	
Tran	sport # 1	020-X0001			C (clear)			
F	hone No.	123-456-7890		(U	se default)		Layover	
	Driver 1	John Smith			c (clear)	Vehicle 1	ABC123	۹
Driver's Name		John Smith				Vehicle Make	Rambler	
Employee ID		MMCPE99999				Vehicle Model	American	
Driver's Lic. No.		XY123456				License Plate	ABC123	
	1 🗘 (d	etails)						
0 1	🗘 (trar	nsporter)						
Pack	age # 1	ABCDEF01234567000001	305	0 9	(clear)			
Whs	le. Price	\$ 0.01						
Quid	k Entry	Quick entry packages		0	F			
O 1 ♀ (package)				CSV or TXT file up		1 Mb with one package label value per line	e is requ	
							Select files	
1 🗘 (d	estination)							
ubmitting mult Label, Gross \	iple packag Veight, UOI these fields	e values like Gross Weight, U //, and Wholesale Price in a cs the upload will not populate t	nit Of sv file he va	f Measur with ea alues on	e, or Whole ch record or the page.	sale Price please incl n a new line. If the Tra	lude a header row ansfer Type chosen	

Figure 7: Seeds/Clones Licensed Transfer type





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 <u>Support.Metrc.com</u>, 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 <u>Metrc Learn</u>.

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.