Metrc Support Bulletin

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

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.

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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.

<u>Activating Permissions for External Transfers:</u>
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.

2. Submit a [Change of Operations](#) request to DCCCompliance@com.ohio.gov, 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.

<u>Before getting started:</u>
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.
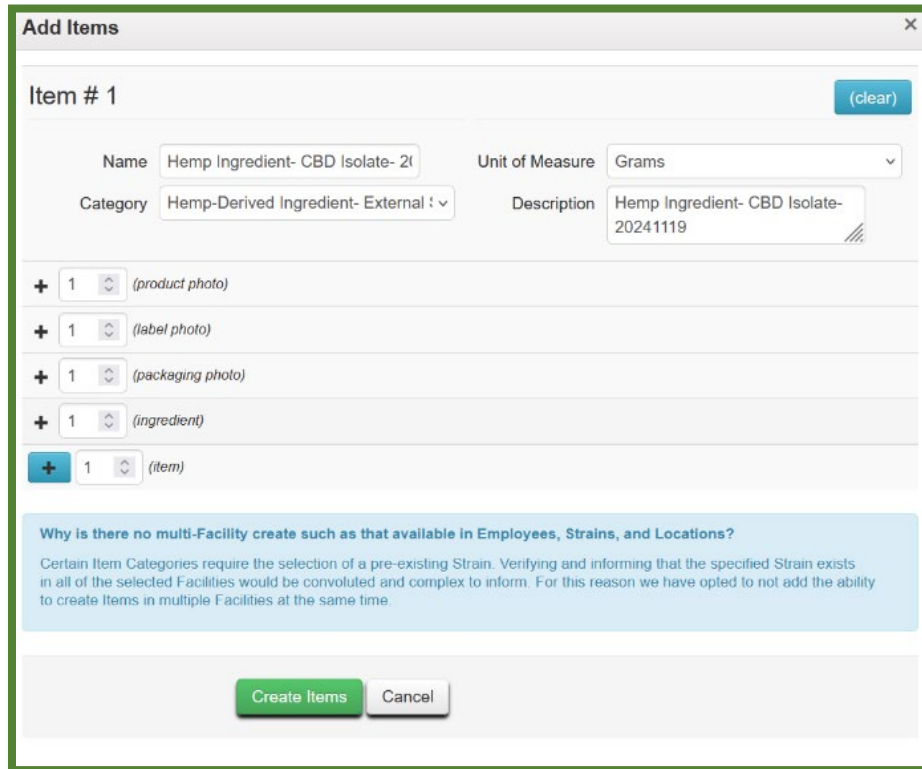
1. <u>External Seeds and Clones</u>:
   - Metrc Product Category is "Seeds" or "Clones"-:
   - Available for cultivation only. Processors may not intake seeds or clones.
   - Item name must be in the following format:
     "External Seeds- Strain-Date," or **"External Clones- Strain-Date"** where "Strain" 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.
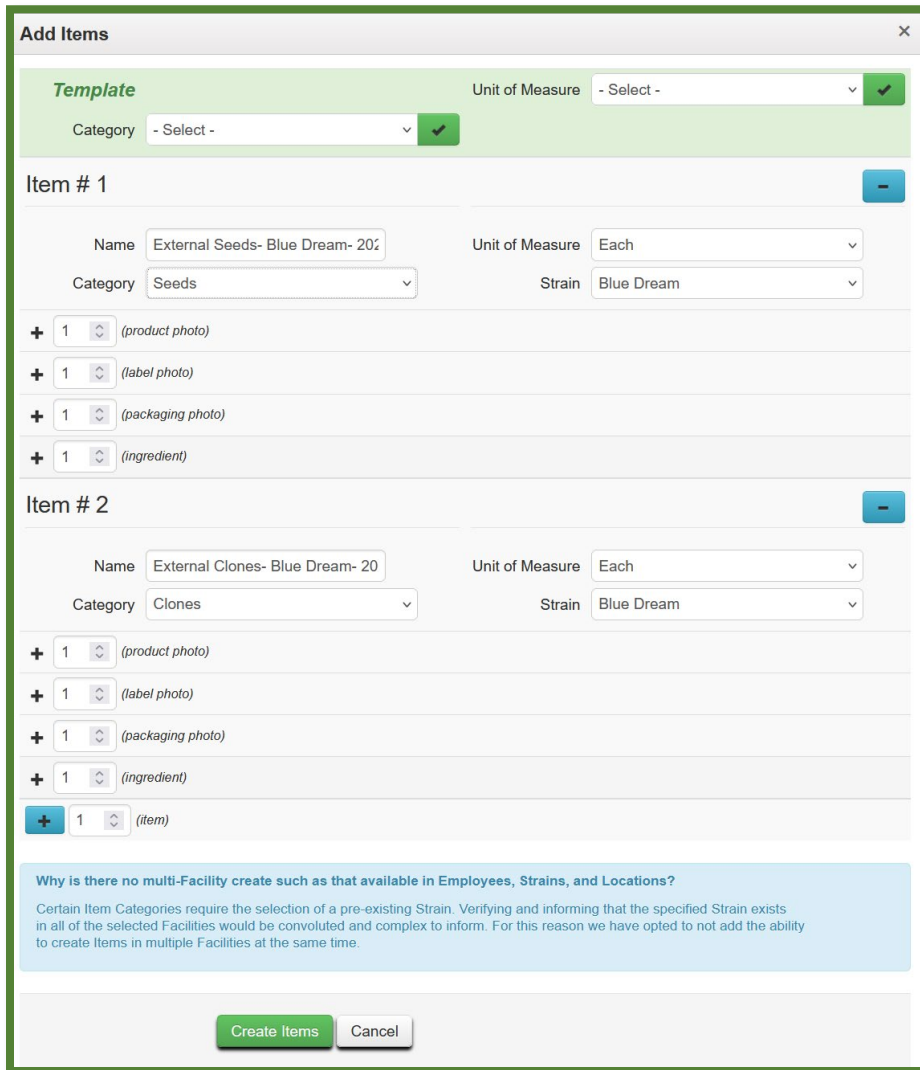
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Creating Incoming External Transfers:

1. 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.

Figure 1a: Adding a new item for hemp

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

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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, clones, or hemp-derived ingredients.</u> – see **Figure 2**
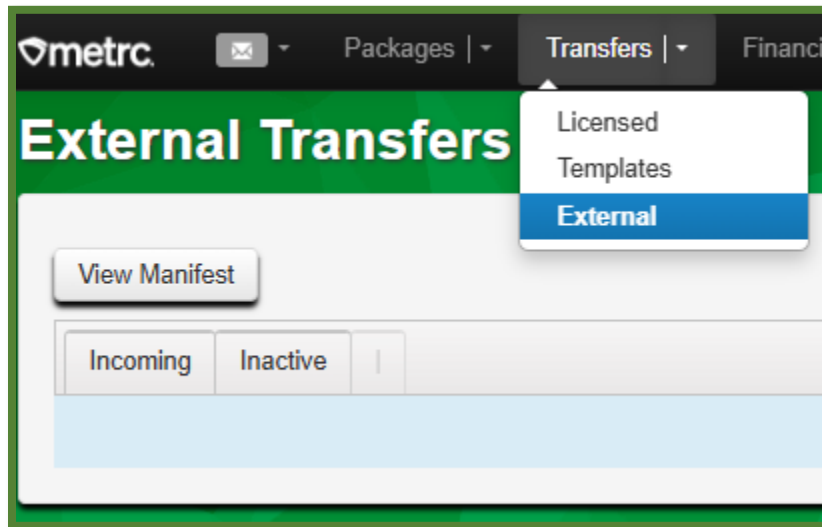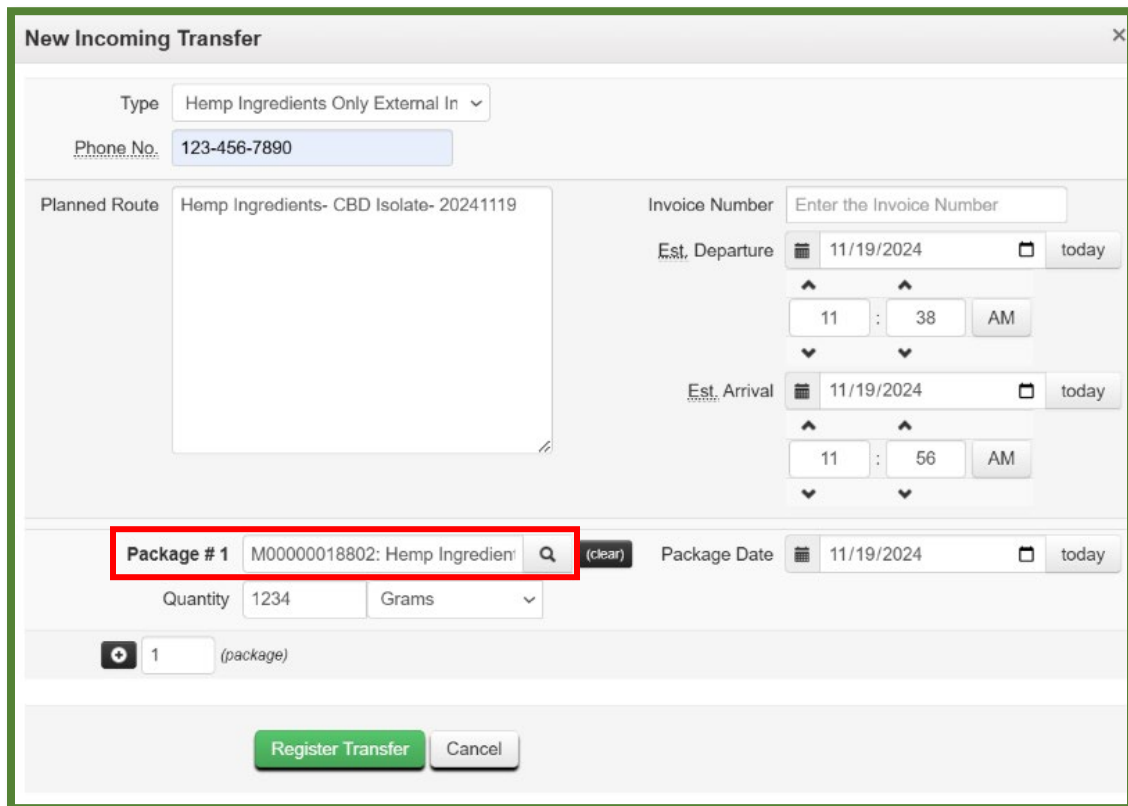

Figure 2: External transfers option in transfers navigation menu

3. Select the Incoming tab and click New Transfer – **Figure 3**
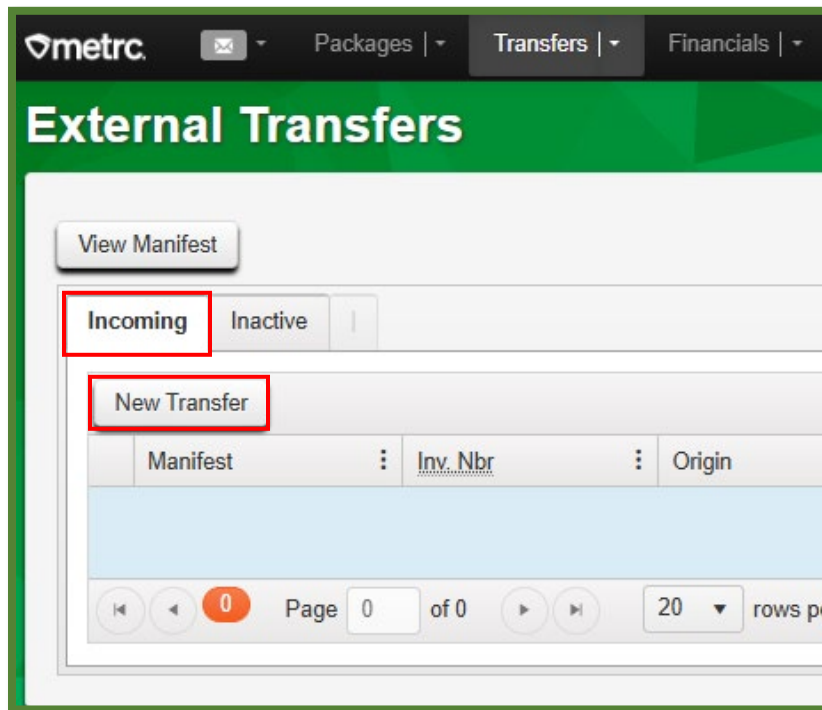
Figure 3: Incoming tab in external transfers area

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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**.

Figure 4a: Incoming external transfer action window, hemp

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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.

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Receiving an Incoming External Transfer

1. 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**.
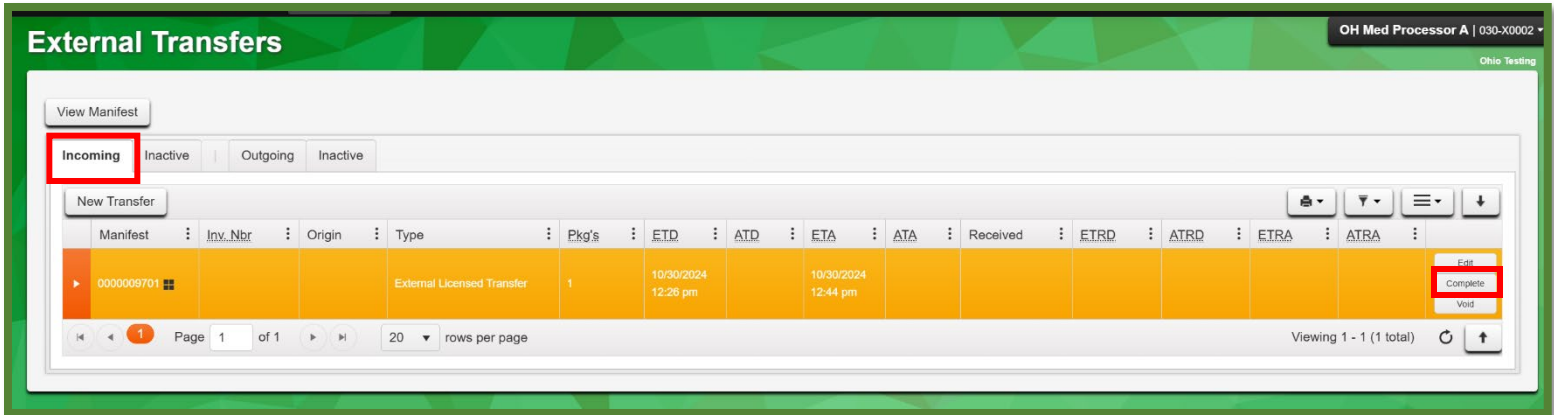
Figure 5a: Incoming tab in external transfers area, hemp
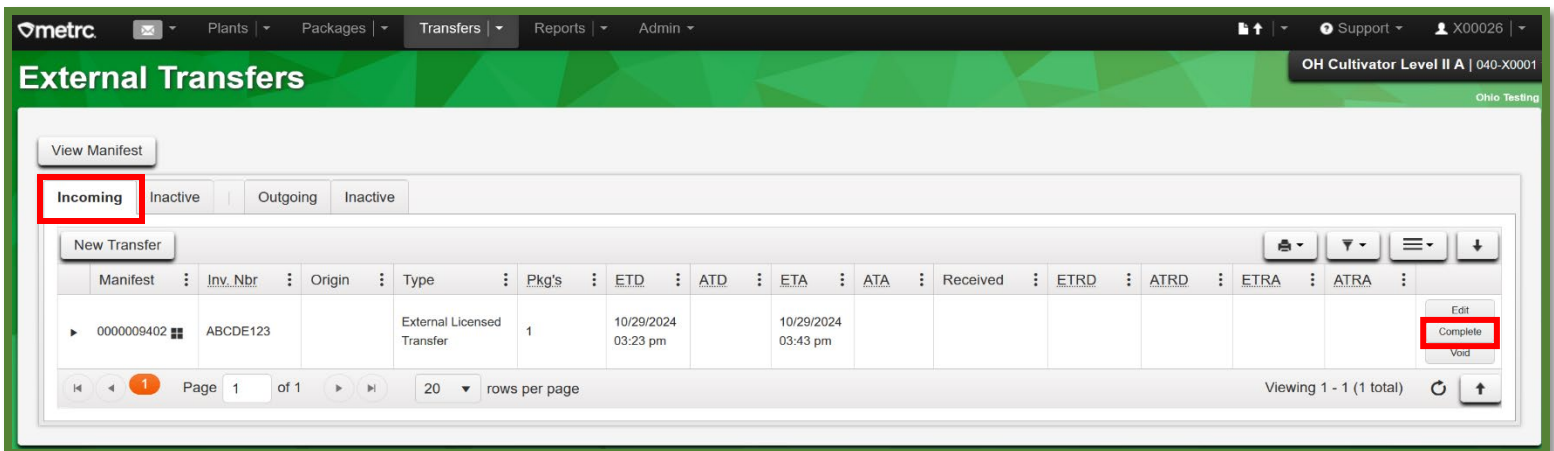
Figure 5b: Incoming tab in external transfers area, seeds/clones

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"

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

Figure 6a: Completing incoming external transfer, hemp

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

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![metrc logo]

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**.

Figure 7: Seeds/Clones Licensed Transfer type

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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, 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.

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