

Recording Transfer Manifests

General Recording Requirements for Medical Marijuana
Grow Site Transfers in METRC (CTS)



Overview

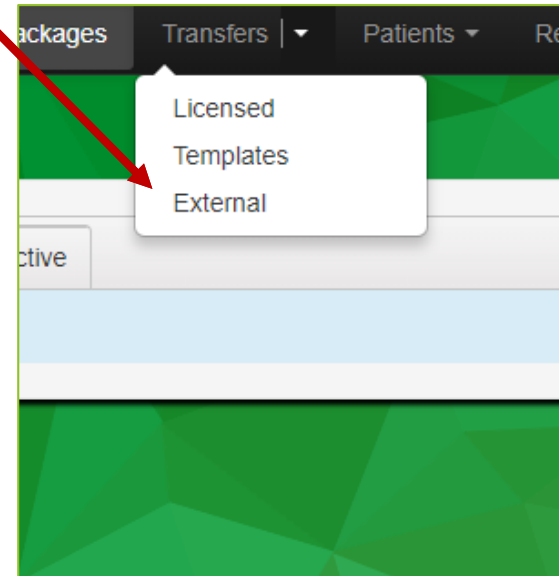
- ▶ This presentation provides information for medical marijuana grow sites that are subject to tracking in the cannabis tracking system (CTS, or “Metrc”) on properly recording a transfer of marijuana to another facility in CTS.
- ▶ Medical marijuana grow sites (“grow sites”) with three or more patients are subject to tracking in CTS.
- ▶ Grow sites subject to tracking in CTS may transfer limited amounts of marijuana to recreational marijuana Processor and Wholesaler licensees, but must first register with OLCC.
- ▶ Grow sites with fewer than three patients are not subject to tracking in CTS and may not transfer marijuana to recreational marijuana licensees.
- ▶ **What this presentation is not:**
 - ▶ This process does not apply to a medical marijuana grow site that is applying for its own recreational marijuana Producer license and that will be bringing its medical marijuana inventory into that license. For information on that process, see “[Inventory Transfer Request Forms](#)” on OLCC’s website (link at end of this presentation.)

Different Transfer Types

When to use “External” OR “Licensed” transfers in CTS

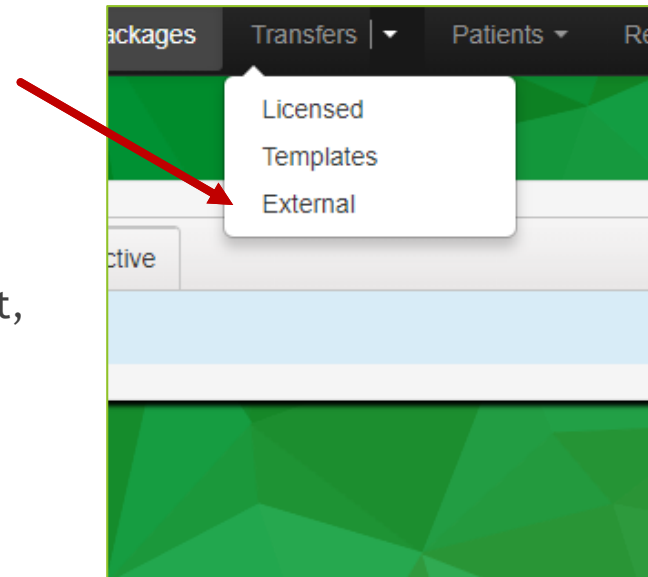
“External” vs. “Licensed” Transfers

- ▶ Grow sites often use “External” transfers.
- ▶ External transfers track marijuana items coming into the tracked system from untracked sources (from patients) or going out to untracked sources (to patients.)
- ▶ External transfers are also used by medical grow sites when receiving immature plants from any source. [See medical marijuana initial setup guide for instructions on external transfers.](#) (Link at end of this presentation.)
- ▶ “Licensed” transfers track marijuana being transferred **between two facilities that are both in the cannabis tracking system (CTS.)**
 - ▶ This includes transfers to recreational Processors and Wholesalers if the grow site is registered for the “20 pound transfer.” See links at end of presentation.



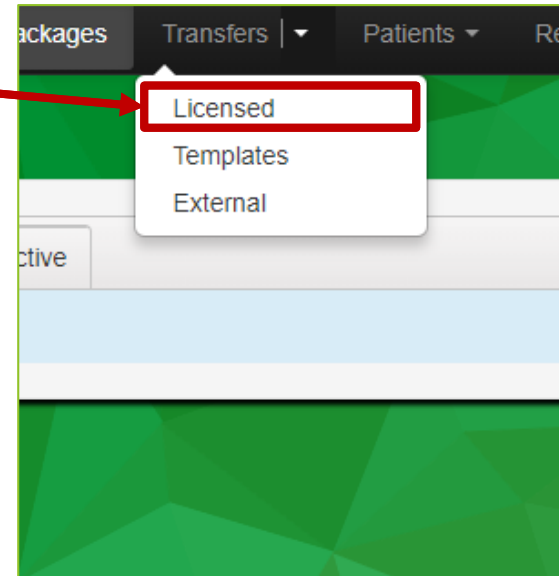
When to use a “External” Transfer

- ▶ “External” transfer should be used by a medical grower when:
 - ▶ Receiving marijuana from or sending to a **patient or caregiver**.
 - ▶ Receiving plants to be produced on behalf of a patient, including:
 - ▶ Plants gifted from another patient or caregiver;
 - ▶ Plants purchased from a recreational Retailer;
 - ▶ Plants obtained from a medical dispensary;
 - ▶ Plants received from a recreational marijuana Producer licensee that is approved to produce marijuana for patients.
- ▶ External transfers Plants must be assigned to a patient as part of the incoming manifest.



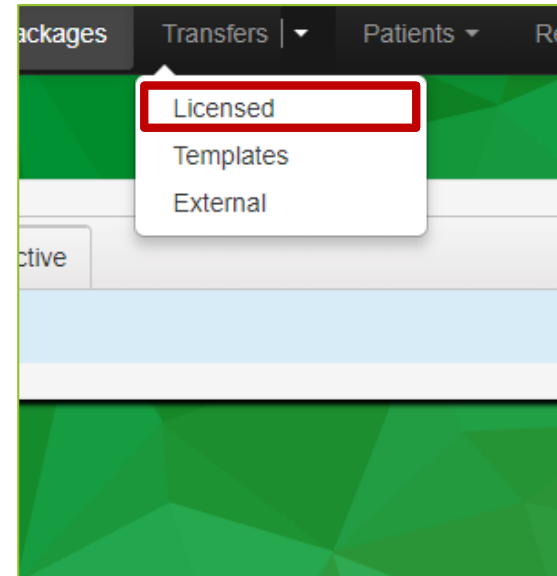
When to use a “Licensed” Transfer

- ▶ “Licensed” transfers must be used by a medical marijuana grow site when:
 - ▶ Transferring marijuana to a **medical marijuana processing site** or **medical marijuana dispensary**,
 - ▶ Transferring marijuana to a **recreational marijuana Processor*** or a **recreational marijuana Wholesaler***, and
 - ▶ Transferring a test sample to an **OLCC laboratory** for compliance testing.
- ▶ * Requires registration with OLCC for “20 pound transfers.” For more information see link at end of presentation.



When not to use a “Licensed” Transfer

- ▶ Do not record a licensed transfer when transferring to a caregiver or patient.
- ▶ Do not record a licensed transfer when purchasing plants from a retailer or dispensary.
 - ▶ Instead, those locations record a “sales transaction” and the grow site records an incoming external transfer.
- ▶ Do not record a licensed transfer when receiving plants from a recreational Producer with a “bump up” canopy.
 - ▶ The “bump up” canopy allows a Producer additional canopy space to provide usable marijuana to patients. In addition, such Producers may transfer immature plants to growers.
 - ▶ The Producer records an outgoing external transfer. The grow site records an incoming external transfer, if subject to CTS tracking



Summary of Transfer Types for Grow Sites

▶ External

- ▶ To patient or caregiver
- ▶ From patient or caregiver
- ▶ When receiving plants to the grow site from any source on behalf of patient

▶ Licensed

- ▶ To recreational Processor or Wholesaler (GSA must register with OLCC first)
- ▶ To medical processing site or medical dispensary

▶ Prohibited

- ▶ Grow sites may not transfer to other grow sites
- ▶ Grow sites may not transfer to recreational Retailers
- ▶ Grow sites may not possess cannabinoid items*

- ▶ (*If a grower is also a caregiver and manufactures homemade cannabinoid items that do not require a processing site registration, then the usable marijuana is transferred via external transfer to the caregiver, even if it is the same person as the grower. Caregiver activities take place outside CTS tracking and should not be part of grow site operations.)

20-pound Transfers

Transfers of usable marijuana from medical grow sites to recreational
Processor and Wholesaler licensees

Applying for the Transfer Privilege

- ▶ A medical marijuana grow site may transfer usable marijuana to recreational marijuana Processor and Wholesaler licensees if:
 - ▶ The grow site was first registered on or before August 2, 2017;
 - ▶ The grow site has been continuously registered since that time;
 - ▶ The grow site administrator (GSA) submits the required application documents to OLCC;
 - ▶ The application documents include proof of legal access to water for commercial purposes;
 - ▶ The application is approved by OLCC.
- ▶ Transfers to licensees are “one-way.” Recreational Processors and Wholesalers may not return marijuana to the grow site.
- ▶ Recording a transfer will display the grow site location and contact to the recipient.

Licensed Transfers

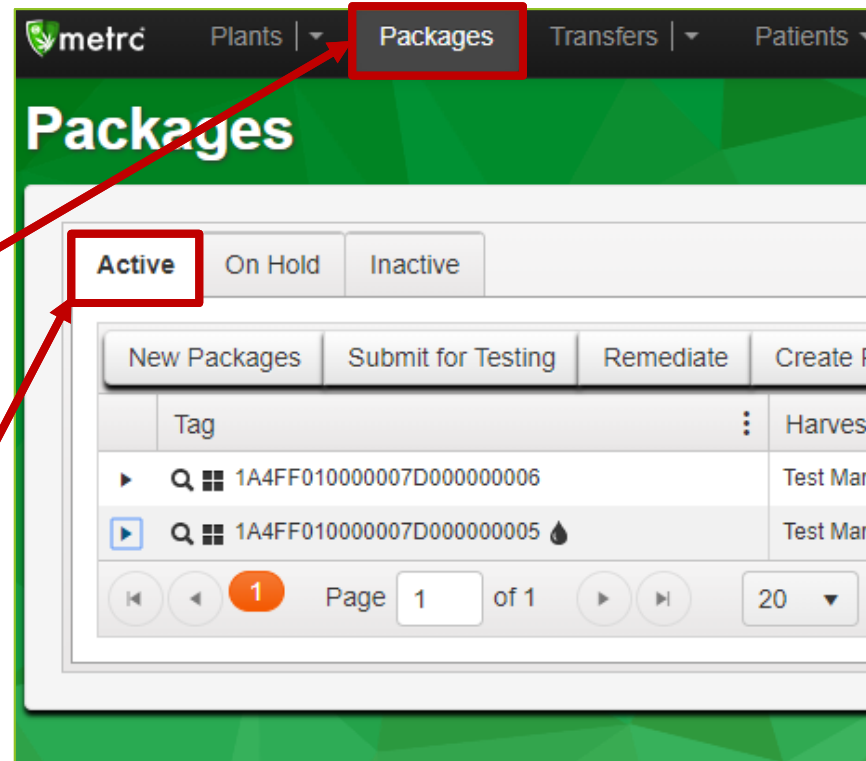
How to Record a “Licensed” facility-to-facility transfer in CTS

Check Inventory

- ▶ Before recording any transfer, confirm the items you want to transfer are correctly inventoried in CTS. To check:

- ▶ Navigate to the “Packages” section by clicking in the upper menu.

- ▶ Select the “Active” packages tab if it is not selected. This will display all packages recorded in your inventory that are not at zero weight and “finished.”



Check Inventory

- ▶ From the “Active” tab, find your marijuana item.
- ▶ Compare the UID to the physical package tag.
- ▶ Compare the item description/strain.
- ▶ Compare the category.
- ▶ Compare the weight.
- ▶ If you find any discrepancies, you can correct them by repackaging, changing item types, and/or recording adjustments.

Active On Hold Inactive

New Packages Submit for Testing Remediate Create Plantings New Transfer

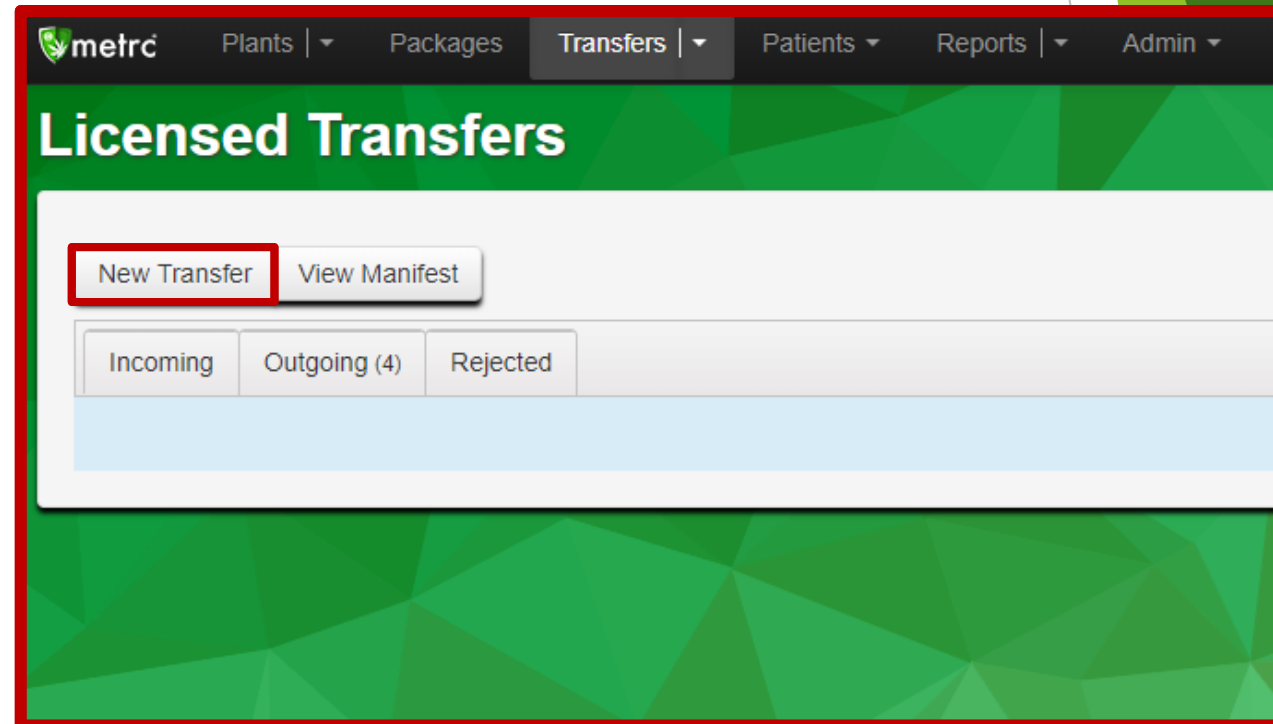
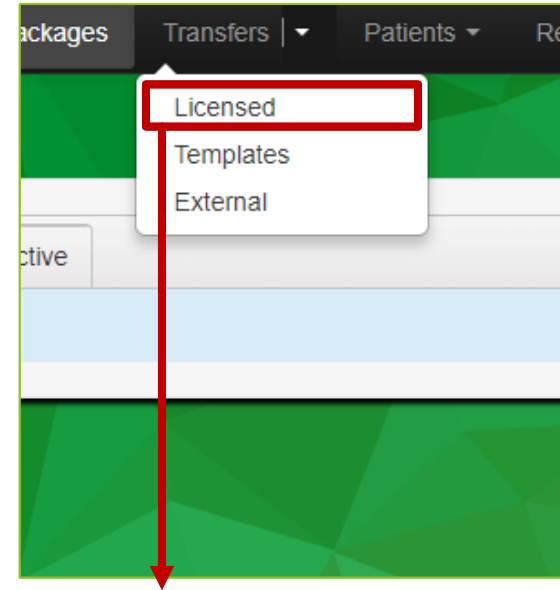
Change Items Change Patients Adjust Finish

Tag	Harvest	Item	Category	Patient	Quantity	Lab Testing	Date
1A4FF010000007D0000000006	Test Manicure 6.1.18	Blue Dream Plants	Immature Plants	1336679	3 ea	SubmittedForTesting	08/08/2018
1A4FF010000007D0000000005	Test Manicure 6.1.18	OG kush	Buds		22 g	SubmittedForTesting	07/02/2018

Page 1 of 1 20 rows per page Viewing 1 - 2 (2 total)

Enter the Transfer Interface

- ▶ Once you know what packages you are adding, select “Transfers” from the menu and select “Licensed” in the drop-down. This will open the “Licensed Transfers” screen.
- ▶ Three sections will display current or complete licensed transfers.
- ▶ Medical grow sites should generally have no “incoming” licensed transfers.
- ▶ To create a new manifest to another CTS facility, select “New Transfer.”



The New Transfer Window

- ▶ Clicking “New Transfer” opens the “New Licensed Transfer” window.
- ▶ You will need to know your destination. If you know the CTS license number, you can begin typing it. Include the prefix (such as 230- for medical processors, 030- for recreational processors, 250- for medical dispensaries, or 060- for recreational wholesalers.)
- ▶ **Confirm the license number with the recipient prior to recording the transfer.**
- ▶ If you need to search, click the magnifying glass icon. You may need to search if you have only a name or a partial license number.
- ▶ Enter a description of the transport route.
- ▶ Click “Type” and select “Licensed” from the drop-down.

The screenshot shows the "New Licensed Transfer" window with the following elements:

- Destination 1:** A search field with the placeholder text "Type part of the License Number." and a magnifying glass icon. A red box highlights this field.
- Planned Route:** A large empty text area for entering the transport route. A red box highlights this area.
- Type:** A dropdown menu currently set to "- Select -". A red box highlights this dropdown.
- Est. Departure:** A date and time selector showing "10/10/2018" and "today" with time fields for "03 : 32 PM".
- Est. Arrival:** A date and time selector showing "10/10/2018" and "today" with time fields for "03 : 32 PM".
- Package # 1:** A search field with the placeholder text "Type part of Package number..." and a magnifying glass icon.
- Buttons:** "Register Transfer" (green) and "Cancel" (grey) buttons at the bottom.

Transporter Details

- ▶ From the “Type” drop-down select “Licensed” to add transporter details. This is for listing information about the person who will be making the physical transport and delivery.
- ▶ By default the transporter will be your CTS license number. This indicates that your facility will be responsible for the transfer.
- ▶ **Employee ID** should be “N/A” unless the person transporting has a recreational marijuana worker permit.
- ▶ **Driver’s Name** will be the person’s legal first and last name.
- ▶ **Driver’s Lic. No.** is the driver license number.
- ▶ **Phone** is the phone of the person transporting or the facility operator (GSA).
- ▶ **Vehicle Make, Model, License Plate** will be the information for the transport vehicle.

New Licensed Transfer

Transporter: 220-55895

- Lookup -

Employee ID

Driver's Name

Driver's Lic. No.

Phone No. +1-123-456-7890 (use default)

- Lookup -

Vehicle Make

Vehicle Model

License Plate

Destination 1: 010-X0001 (clear)

Type: Transfer

Planned Route: West down Route 100 from grow site. Turn left on Decatur

Est. Departure: 10/10/2018 today 03:38 PM

Est. Arrival: 10/10/2018 today 03:38 PM

Package # 1: 1A4FF010000007D000000006 (clear)

(package)

(destination)

Register Transfer Cancel

Departure and Arrival

- ▶ All manifests must have a specific date, and an estimated departure and arrival time.
- ▶ A Departure date must always be definite.
- ▶ Departure and arrival times are estimates only, so small variances are acceptable.
- ▶ Enter your departure time as accurately as possible.
- ▶ Arrival time should be based on expected travel. Actual arrival may reasonably vary due to traffic, unexpected delays, or driving conditions.

New Licensed Transfer

Transporter: 220-55895

- Lookup -

Employee ID

Driver's Name

Driver's Lic. No.

Phone No.: +1-123-456-7890 (use default)

Destination 1: 010-X0001 (clear)

Planned Route: West down Route 100 from grow site. Turn left on Decatur

Package # 1: 1A4FF010000007D000000006 (clear)

(package)

(destination)

Type: Transfer

Est. Departure: 10/10/2018 today
03 : 38 PM

Est. Arrival: 10/10/2018 today
03 : 38 PM

Register Transfer Cancel

Packages to Transfer

- ▶ By default, only one line will be listed for packages and no information will be in that field.
- ▶ To add additional lines for more packages to the same destination, click the black “plus” icon.
- ▶ If you know the full UID or have saved it, you can enter it. Usually, to add a package to your manifest, you will click the magnifying glass icon.
- ▶ Clicking the icon opens up the selection window.
- ▶ Find the package you wish to add and click the line to highlight it.
- ▶ Click “Select” to add it to the manifest.

Est. Arrival 10/10/2018 today
03 : 38 PM

Package # 1 1A4FF010000007D000000006 🔍 (clear)

⊕ (package)

⊕ (destination)

Register Transfer Cancel

Select

Items already selected in the work dialog will not be available in the list below

Tag	Harvest	Item	Category	Patient	Quantity	P.B. No.	Lab Testing	A.H.
1A4FF010000007D000000006	Test Manicure 6.1.18	Blue Dream Plants	Immature Plants	1336679	3 ea		SubmittedForTesting	No
1A4FF010000007D000000005	Test Manicure 6.1.18	OG kush	Buds		22 g		SubmittedForTesting	No

Select Cancel

Record the Transfer

- ▶ Once you have added all information, review the transfer window to confirm everything is correct.
- ▶ When you are ready to create the manifest, click “Register Transfer.”
- ▶ This will record the transfer and generate a transport manifest.
- ▶ After clicking “Register Transfer,” you may need to wait several seconds for the system to update information.
- ▶ You will be returned to the “Licensed Transfers” section.

The screenshot shows a web application window titled "New Licensed Transfer". The form contains the following fields and controls:

- Transporter:** Input field with value "220-55895" and a search icon.
- Employee ID:** Input field with value "N/A".
- Driver's Name:** Input field with value "Jane Doe".
- Driver's Lic. No.:** Input field with value "OR 1234576".
- Phone No.:** Input field with value "555-555-5555" and a "(use default)" link.
- Vehicle Make:** Input field with value "Ford".
- Vehicle Model:** Input field with value "F150".
- License Plate:** Input field with value "ABC 123".
- Destination 1:** Input field with value "010-X0001" and a "(clear)" button.
- Planned Route:** Text area containing "West down Route 100 from grow site. Turn left on Decatur."
- Type:** Dropdown menu with value "Transfer".
- Est. Departure:** Date and time picker showing "10/10/2018" and "03:48 PM".
- Est. Arrival:** Date and time picker showing "10/10/2018" and "03:48 PM".
- Package # 1:** Input field with value "1A4FF010000007D000000005" and a "(clear)" button.
- Buttons:** A green "Register Transfer" button (highlighted with a red box) and a grey "Cancel" button.

View the Manifest

- ▶ From the “Licensed Transfers” section, make sure you are on the “Outgoing” tab by clicking it.
- ▶ This section displays all of your outgoing manifests.
- ▶ The licensee you are transporting to will see a similar line in their own “Incoming” tab.
- ▶ Click the line to highlight it.
- ▶ Click the “View Manifest” button near the top of the section to view the manifest as it will appear when printed.

Licensed Transfers

New Transfer View Manifest

Incoming **Outgoing (4)** Rejected

Manifest	Transporter	Driver	Vehicle Info	Destin
▶ 0000014501	220-55895 741 PLACER RD WOLF CREEK OR JOSEPHINE 97497-9750	Jane Doe	Make: Ford Model: F150 Lic. Plate: ABC 123	010-X000
▶ 0000014401	220-55895 741 PLACER RD WOLF CREEK OR JOSEPHINE 97497-9750	XXX	Make: xxx Model: xxx Lic. Plate: xxx	010-X000
▶ 0000014201	220-55895 741 PLACER RD WOLF CREEK OR JOSEPHINE 97497-9750	XXX	Make: xxx Model: xxx Lic. Plate: xxx	230-MMF
▶ 0000008701	220-481 000 SAMPLE RD PTOWN OR DESCHUTES 97292	XXX	Make: xxx Model: xxx Lic. Plate: xxx	220-5850
▶ 0000005902	220-55895 741 PLACER RD WOLF CREEK OR JOSEPHINE 97497-9750	XXX	Make: xxx Model: xxx Lic. Plate: xxx	N/A

Print and Deliver

- ▶ Clicking on “View Manifest” will open the manifest as a PDF in a new window or browser tab.
- ▶ Print two copies to accompany the transport.
 - ▶ One physical copy of the manifest must be present with the marijuana items to be received at another facility and another copy must accompany the marijuana in transport.
- ▶ The recipient must verify each item tag and quantity on the manifest and in CTS.
- ▶ The recipient must “Accept” or “Reject” each item in CTS before the transporter leaves the premises.
- ▶ The recipient must then sign the physical manifest and circle any rejected items.

metrc		OREGON LIQUOR CONTROL COMMISSION CANNABIS TRANSPORTATION MANIFEST	
All sales transactions are to be completed prior to transportation of any CANNABIS. The receiving entity may reject product delivered, but amount delivered must be limited to amount agreed upon in prior sales transaction.			
Manifest No.:	0000014501	Date Created:	10/10/2018 3:51 PM
Originating Entity:	74 PLASTER RD WOLF CREEK OR 97497-9750	Originating License Number:	22-55-55
Address of Originating Entity:	74 PLASTER RD WOLF CREEK OR 97497-9750	Phone No. of Originating Entity:	
Contact Phone No. for Inquiries:	503-555-5555	Destination # 1:	OR PERCEPTIVE TESTING LABS, LLC
Destination License Number:	01-XX-01	Destination Phone No.:	+1-503-420-1234
Address of Destination:	9079 SE McCoughlin Blvd. Portland, OR 97222-7355	Date and Approx. Time of Departure:	10/10/2018 3:51 PM
Route to be Traveled:	West down Route 100 from [redacted] site. Turn left on Decatur	Date and Approx. Time of Arrival:	10/10/2018 3:50 PM
Name of Person Transporting:	Jane Doe	State Driver's License No.:	OR 123-4567
Make, Model, License Plate No.:	Ford F150 AB123	Signature of Person Transporting:	
Package # 1	Production Batch No.	Item Name	Quantity
1A4FF010000007D000000005 Lab Test: SubmittedForTesting State: Shipped		OG kush (Buds)	Shp: 22.0000 g
Harvests:	Test: Marijuana 1.18	REJECT PRODUCT (if only a portion of shipment is rejected, circle the portion above)	
Name of Person Receiving/Rejecting Product:			
I confirm that the contents of this shipment match weight records entered above, and I agree to take custody of those portions of this shipment not circled above. Those portions circled were returned to the individual delivering this shipment.			
Signature:		Date:	
Signature of individual taking receipt of rejected portion of this shipment:			

Completing Delivery

- ▶ If all marijuana items were accepted in CTS and left at the destination, then transfer is complete.
- ▶ Items “accepted” in CTS will no longer display in the origin facility’s inventory. They will now be in the recipient’s inventory.
- ▶ If any items were “rejected” in CTS, then they must be returned to the origin facility.
- ▶ After returning them to the original site, the origin CTS administrator must receive the items back into the site inventory.
- ▶ Navigate to the “Licensed Transfers” section in CTS and select the “Rejected” tab.
- ▶ Click “Receive” to accept the item back into inventory.

The screenshot shows the 'Licensed Transfers' interface. At the top, there are buttons for 'New Transfer' and 'View Manifest'. Below these are tabs for 'Incoming', 'Outgoing (3)', and 'Rejected'. The 'Rejected' tab is selected and highlighted with a red box. Below the tabs is a table with columns: Manifest, License No., Rejector, Type, Transporter, Driver, Pkg's, and Received. A single row is visible with the following data: Manifest: 0000014201, License No.: 230-MMPS232074, Rejector: Cascade Extracts LLC, Type: Transfer, Transporter: 220-55895, 741 PLACER RD WOLF CREEK OR JOSEPHINE 97497-9750, Driver: XXX, Pkg's: 1, Received: 10/18/2018 03:13 pm. A 'Receive' button is located to the right of the 'Received' column for this row, also highlighted with a red box. At the bottom of the interface, there are navigation controls including a page indicator 'Page 1 of 1', a dropdown for '20 rows per page', and a status indicator 'Viewing 1 - 1 (1 total)'.

Receiving Rejected Items

- ▶ Clicking “Receive” will open the “Receive Rejected Transfer” window.
- ▶ Confirm the items that were rejected are correct, and that all tags, items, and weights are correct by reweighing items.
- ▶ Select a rejection reason from the drop down. In general this should be the same as the reason the destination licensee recorded.
- ▶ You may enter an optional note if you wish. The field will scroll to allow you to enter additional text.
- ▶ Click “Receive Transfer” to receive the items back into your inventory.
- ▶ To confirm, you can navigate to your “Packages” section, select the “Active” tab, and search for the associated UID.

Receive Rejected Transfer

Manifest	0000014201	Transfer Type	Transfer
Origin Lic. No.	220-55895	Origin Name	741 PLACER RD WOLF CREEK
Main Phone No.		Mobile Phone No.	
Transporter Lic. No.	220-55895	Transporter Name	741 PLACER RD WOLF CREEK
Employee ID	xxx	Vehicle Make	xxx
Driver's Name	xxx	Vehicle Model	xxx
Driver's Lic. No.	xxx	License Plate	xxx
Phone No. for Questions	5555555555		

Package # 1

Item Shipped Qty. ea

Reject Reason

Optional Note

Things to Remember

- ▶ **Transfers to recreational marijuana licensees from grow sites are one-way.**
 - ▶ Recreational marijuana licensees are prohibited from transferring marijuana directly to a medical marijuana grow site, even as a return.
- ▶ **Visibility is also one-way.**
 - ▶ A grow site that is registered will be able to see all Wholesaler and Processor licensees as valid destinations, but the Wholesaler or Processor will only see your grow site address in CTS if you record a manifest to their location.
- ▶ **Wholesalers and Processors are not obligated to accept a transfer.**
 - ▶ Ensure you have contacted the recipient licensee prior to attempting a transfer and that they are willing to receive the item.
- ▶ **You must have a personal agreement with the patient(s) that allows for the transfer.**
- ▶ **A grow site may transfer no more than 20 pounds of usable marijuana to recreational licensees in any 12-month period.**
 - ▶ The limit is 20 pounds per grow site, not per grower. The marijuana does not all need to be transferred at once or to the same recipient, but no more than 20 pounds may be transferred from the grow site in this way per 12-month period.
- ▶ **Recreational marijuana Retailers may not receive usable marijuana directly from a grow site.**
 - ▶ However, a grow site may transfer usable marijuana to a Wholesaler who may then transfer it to a Retailer.
- ▶ **All testing requirements must be met prior to transfer.**

Useful Links

- ▶ **OLCC information and documents for medical marijuana tracking in CTS:**
 - ▶ https://www.oregon.gov/olcc/pages/ommp_tracking.aspx
- ▶ **OLCC’s “How to” guide for medical marijuana initial setup in CTS:**
 - ▶ <http://tinyurl.com/OLCC-CTS-HOW-TO>
- ▶ **OHA Information for the medical marijuana program:**
 - ▶ <https://www.oregon.gov/oha/PH/DISEASESCONDITIONS/CHRONICDISEASE/MEDICALMARIJUANAPROGRAM/Pages/index.aspx>
- ▶ **Metrc’s CTS YouTube page:**
 - ▶ <https://www.youtube.com/channel/UCcasu4orlpyqqEmQWWOkW0w>
- ▶ **Sign up for CTS training:**
 - ▶ <https://www.metrc.com/oregon>
- ▶ **Inventory Transfer Request forms for grow sites seeking a recreational Producer license:**
 - ▶ https://www.oregon.gov/olcc/marijuana/Pages/Forms_Publications.aspx
- ▶ **Contact Metrc Support for questions on using CTS (How do I...?):**
 - ▶ Phone: 1-877-566-6506
 - ▶ Email: support@metrc.com
- ▶ **Contact OLCC for questions on CTS tracking requirements (Can I...?):**
 - ▶ Phone: 503-872-6366
 - ▶ Email: marijuana.cts@oregon.gov