



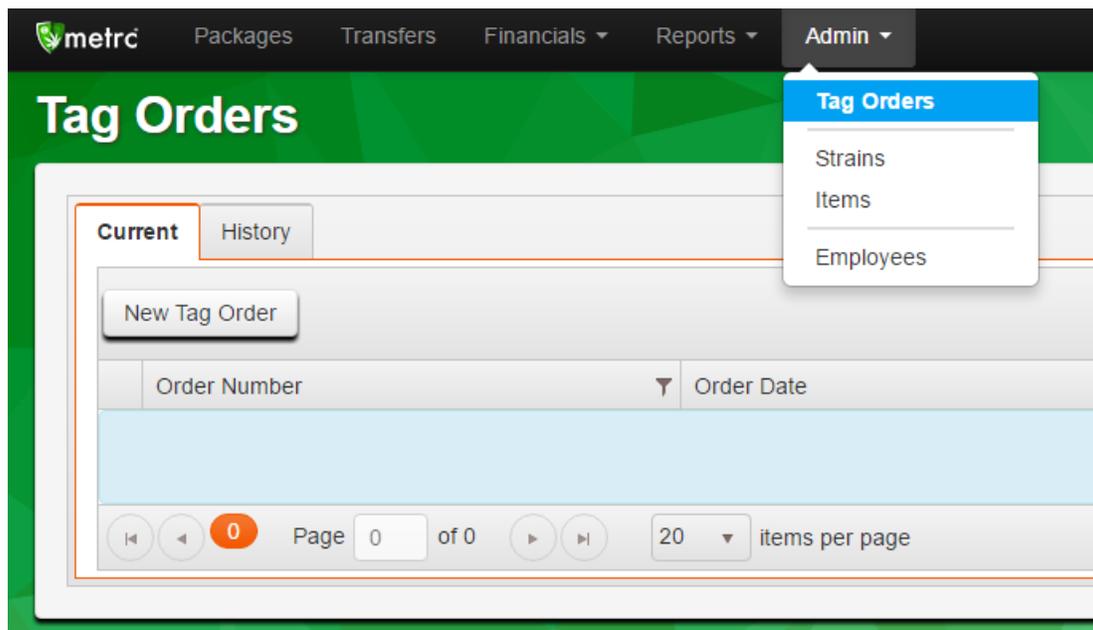
# Processor and Retailer Inventory Transfer Metric Guide

If you are a current medical registrant becoming licensed with the OLCC you may request to bring in inventory acquired as a registrant into the OLCC system using the Inventory Transfer provision in OLCC rules. The requirements and information needed to have your transfer request approved by the OLCC as part of the licensing process depends on your license type.

This guide is meant to illustrate how to enter approved inventory transfer products into Metrc upon licensure. It is intended as a complement to the Metrc Quick Reference Guide, which is available in your Metrc account under the Support tab.

After being credentialed into Metrc the first thing you should do is order RFID tags. Tags are printed in Florida, where Franwell (Metrc's parent company) is based. Consequently, it typically takes 5 to 6 business days for the tags to arrive at your facility, even if you order them the first day you are licensed. To order tags, log into your Metrc account and click Tag Orders under the Admin tab.

Figure 1: Ordering Tags



During the first ten calendar days of licensure, while tags are in transit, the requirement to reconcile inventory each day is waived (see OAR 845-025-7580 (2) of OLCC's administrative rules for more details). This means that until tags arrive or after ten calendar days, **whichever is sooner**, you may engage in licensed activity without tracking it in Metrc. However, there are two important caveats:

- 1) While tags are in transit and product is untagged they may not be transferred to other licensees. Retailers may sell to consumers after tags have been ordered, but processors may not transfer until tags arrive.
- 2) When the tags do arrive, you are required to set up your inventory **as it was on the first day of licensure**. Any changes that have occurred (e.g. items were sold to consumers) must be reflected in Metrc for **each day** that has elapsed. For example, if you become licensed on

Monday and tags arrive on Friday, you must account for each individual days' worth of activity in Metrc.

## Setting Up Items

Before tags arrive you can set up items in your account. This is a necessary first step for when packages are created, and can be done even if you do not have tags in stock.

In this example, a retailer<sup>1</sup> has been approved to transfer the following products. A guide to help you properly categorize your products in Metrc (for example, how to distinguish between extracts and concentrates) is [available on the OLCC website](#).

Product Name	Item Type	Quantity	Total Weight
Blue Dream buds	Flower/Buds	10 oz	10 oz
Sour Diesel buds	Flower/Buds	12 oz	12 oz
Vape cartridge	Extract	20 ea	20 g
Shatter	Extract	25 oz	25 oz
Chocolate Chip Cookies	Edible	26 ea	52 oz
Chocolate Brownies	Edible	15 ea	45 oz

There is a two-step process for creating items. Each of these areas of Metrc is accessible via the Admin tab.

- 1) For strain-specific usable marijuana (buds and shake/trim), you must first create the strain in your Metrc account. For the most part this is for internal reference only; the potency and indica/sativa genetics are not viewable when the product is transferred or sold, and potency for the purposes of state rules is verified by lab testing.

Figure 2: Creating strains

The screenshot shows the 'Edit Strains' window in Metrc. It contains two strain entries:

- Strain # 1:** Strain: Blue Dream, Name: Blue Dream, Testing Status: In-House, THC: 0.17, CBD: 0.035, Indica: 0, Sativa: 100.
- Strain # 2:** Strain: Sour Diesel, Name: Sour Diesel, Testing Status: In-House, THC: 0.2, CBD: 0.025, Indica: 0, Sativa: 100.

At the bottom, there is a note: "Please report THC potency as a percentage of the overall weight. This means that if a particular strain tested as having 10% THC potency, then every gram of dried flower of that strain has 0.15 grams of THC. The reality is that potency can drastically change even between a single plant or from plant to plant. So, the percentage that should be entered into metrc® would be the average potency percentage from all tests in the prior two years. If no tests have been conducted please use your best estimate." Below the note are 'Save Strains' and 'Cancel' buttons.

<sup>1</sup> Whether the license type is a processor or retailer is largely irrelevant; the only meaningful difference between the two is the product mix likely to be transferred.

- 2) After strains have been created you can then create the individual items with a name, category of product, and a default unit of measure. Depending on the item category chosen, in some cases a strain name will be required (which was created in step 1) and in other cases (for “each” items) a “weight per unit” is required.

Figure 3: Add Usable Marijuana Items

The screenshot shows a web application window titled "Add Items" with a close button (X) in the top right corner. The window contains two sections for adding items, each with a minus button (-) in the top right corner.

**Item # 1**

- Name: Blue Dream Buds
- Category: Buds
- Unit of Measure: Ounces
- Strain: Blue Dream

**Item # 2**

- Name: Sour Diesel Buds
- Category: Buds
- Unit of Measure: Ounces
- Strain: Sour Diesel

Below the items is a plus button (+) and a light blue informational box with the following text:

**Why no multi-Facility create such as that available in Employees, Strains, and Rooms?**  
Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

At the bottom of the window are two buttons: "Create Items" (green) and "Cancel" (grey).

Figure 4: Add Extract and Edible Items

The screenshot shows a web form titled "Add Items" with a close button (X) in the top right corner. The form contains four sections, each for a different item, with a minus sign button (-) in the top right of each section. Below the last section is a plus sign button (+).

- Item # 1:** Name: Vape cartridge; Unit of Measure: Each; Category: Extract (each); Unit Weight: 1; Grams.
- Item # 2:** Name: Shatter; Unit of Measure: Ounces; Category: Extract.
- Item # 3:** Name: Chocolate Chip Cookies; Unit of Measure: Each; Category: Edible (each); Unit Weight: 2; Ounces.
- Item # 4:** Name: Chocolate Brownies; Unit of Measure: Each; Category: Edible (each); Unit Weight: 3; Ounces.

Below the plus sign button is a light blue informational box with the following text:

**Why no multi-Facility create such as that available in Employees, Strains, and Rooms?**  
Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

At the bottom of the form are two buttons: "Create Items" (green) and "Cancel" (grey).

In the above examples, notice that each item with a unit of measure of “each” requires a unit weight – this is the average weight per unit of the products being transferred. For example, 15 chocolate brownies are being transferred in and in total the brownies weigh 45 ounces, or 3 ounces per brownie.

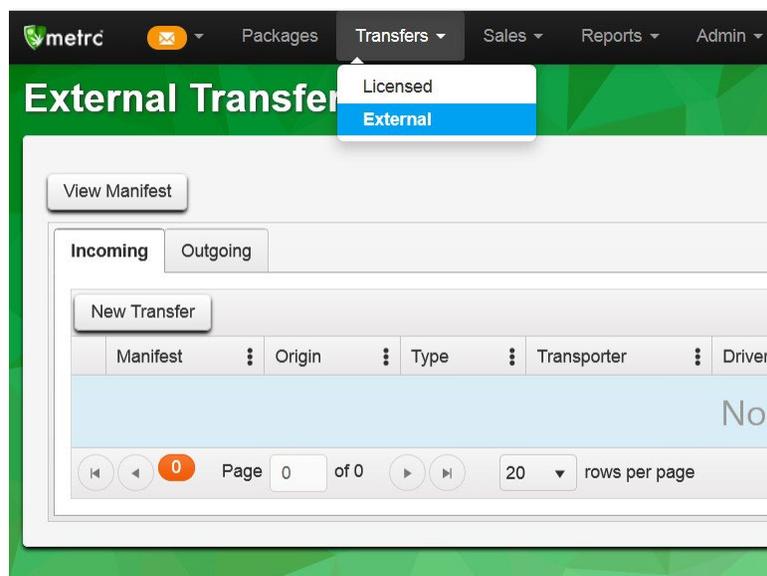
## Creating and Tagging Packages

Once your tags have arrived and you've set up items in your Metrc account, you can now create and tag your actual packages. This is a two-step process that will be created as an Incoming External Transfer.

Incoming External Transfers is a feature in Metrc that allows licensees to receive product in from outside of the "closed loop" OLCC system. This feature should only be used for approved purposes; misuse of this feature may constitute inversion of illegal marijuana items and could result in compliance action against your license, up to and including revocation.

When creating your approved start-up inventory you are essentially transferring possession of the items from your entity registered with OHA to your entity licensed with OLCC. This transfer of possession is documented as a new Incoming External Transfer under your OLCC license. This is a two-step process.

Figure 5: Navigating to Incoming External Transfers



### Step 1: Create the incoming external transfer

Clicking the "New Transfer" button will bring up a screen where you will be able to enter the required information to begin the process of creating your start-up inventory. You should complete the fields as follows:

**Type:** This is the type of incoming external transfer; select "Approved ITR Start-up Inventory."

**OMMP Reg. Number:** This is your registration number when you were registered with OHA and is the former possessor of the product being transferred; this number should match the number entered on the Inventory Transfer Request form that was approved by OLCC.

**Transporter, driver/vehicle information, and planned route:** If items are being transported from one physical location to another this information should reflect the accurate information of the shipment. If the items are remaining on the same physical site and not being physically transported, this information can be populated with the information of the employee entering the data and "X" as the car information.

**Item Name, Quantity, and Packaged Date:** These fields correspond to the specific items and quantities being documented in your licensed inventory. The date packaged should correspond to your first day of licensure. Notice that the quantities of each item in the screenshots below are equal to the quantities listed on the approved transfer manifest form. In some cases the actual amount transferred will be less than the amount declared or applied for. The amounts entered into Metrc should be what you actually are declaring in your inventory.

Figure 5: Create incoming items

The screenshot shows the 'New Incoming Transfer' form in Metrc. The form is divided into several sections:

- Header:** Type: Approved ITR Start-up Invent
- Identification:** OMP Reg. Number: ABC123, Phone No.: 503-555-5555
- Transporter:** Transporter: 050-X0001, Driver Name: Johnny Rockett, Driver's License No.: 987654321, Phone No.: +1-800-420-5555 (use default)
- Vehicle:** Vehicle Make: Ford, Vehicle Model: Pinto, License Plate: XYZ-ABC
- Planned Route:** Approved Inventory Transfer Request
- Estimated Dates:** Est. Departure: 01/29/2018 today, Est. Arrival: 01/29/2018 today
- Packages:**
  - Package # 1: Blue Dream Buds, Quantity: 10 Ounces, Package Date: 01/29/2018 today
  - Package # 2: Sour Diesel Buds, Quantity: 12 Ounces, Package Date: 01/29/2018 today
  - Package # 3: Vape Cartridge, Quantity: 20 Each, Package Date: 01/29/2018 today
  - Package # 4: Shatter, Quantity: 25 Ounces, Package Date: 01/29/2018 today
  - Package # 5: Chocolate Chip Cookies, Quantity: 28 Each, Package Date: 01/29/2018 today
  - Package # 6: Chocolate Brownies, Quantity: 15 Each, Package Date: 01/29/2018 today
- Buttons:** Register Transfer, Cancel

**Note:** Clicking “Register Transfer” does not create tagged packages in your inventory; you must complete step 2 (below) to fully reconcile your inventory.

## Step 2: Complete the incoming external transfer and create tagged packages

Step 1 above creates the pending incoming transfer; it does not associate RFID tags with those items. Without completing the transfer you will have no inventory and will not be in compliance with the OLCC's inventory reconciliation requirements.

To create tagged packages you must complete the pending incoming transfer by clicking the "complete" button and entering the required information. The quantities entered in step 1 will be auto-populated; you should confirm the accuracy of the quantities and assign a unique RFID tag to each item. Once the information is accurate and complete, clicking the "Complete Transfer" button will create the packages with the specified quantities in your inventory.

Figure 6: A Pending Incoming External Transfer

The screenshot displays the 'External Transfers' interface. At the top, there is a green header with the text 'External Transfers' and 'OR Lofty Rec-Store 52 | 050-X0001'. Below the header, there is a 'View Manifest' button and tabs for 'Incoming' and 'Outgoing'. A 'New Transfer' button is also visible. The main content is a table with the following columns: Manifest, Origin, Type, Transporter, Driver, Vehicle Info, Pkg's, ETD, ATD, ETA, ATA, Received, and an action column. The table contains one row with the following data: Manifest: 0000003901, Origin: ABC123, Type: Approved ITR Start-up Inventory, Transporter: 050-X0001 OR LOFTY ESTABLISHMENT, LLC, Driver: Johnny Rockett, Vehicle Info: Make: Ford, Model: Pinto, Lic. Plate: XYZ-ABC, Pkg's: 6, ETD: 01/29/2018 03:02 pm, ATD: (empty), ETA: 01/29/2018 03:02 pm, ATA: (empty), Received: (empty). The 'Complete' button in the action column is highlighted with a red box. At the bottom, there is a pagination control showing 'Page 1 of 1' and '20 rows per page', and a status indicator 'Viewing 1 - 1 (1 total)'.

Manifest	Origin	Type	Transporter	Driver	Vehicle Info	Pkg's	ETD	ATD	ETA	ATA	Received	Action
0000003901	ABC123	Approved ITR Start-up Inventory	050-X0001 OR LOFTY ESTABLISHMENT, LLC	Johnny Rockett	Make: Ford Model: Pinto Lic. Plate: XYZ-ABC	6	01/29/2018 03:02 pm		01/29/2018 03:02 pm			Complete

Figure 7: Confirming Quantities and Assigning RFID Tag

**Complete Incoming Transfer** x

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**Manifest**  **Transfer Type**

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**Origin Lic. No.**  **Origin Name**

**Main Phone No.**  **Mobile Phone No.**

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**Transporter Lic. No.**  **Transporter Name**

**Employee ID**  **Vehicle Make**

**Driver's Name**  **Vehicle Model**

**Driver's Lic. No.**  **License Plate**

**Phone No. for Questions**

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<b>Package # 1</b>	<input type="text" value="ABCDEF012345670000013798"/> <input type="button" value="Q"/>	<b>Shipped Qty.</b> <input type="text" value="10"/>	<input type="text" value="oz"/>	<input type="checkbox"/> <b>Reject</b>
<b>Item</b>	<input type="text" value="Blue Dream Buds"/>	<b>Receive Qty.</b> <input type="text" value="10"/>	<input type="text" value="Ounces"/>	<input type="button" value="v"/>
<b>Package # 2</b>	<input type="text" value="ABCDEF012345670000013799"/> <input type="button" value="Q"/>	<b>Shipped Qty.</b> <input type="text" value="12"/>	<input type="text" value="oz"/>	<input type="checkbox"/> <b>Reject</b>
<b>Item</b>	<input type="text" value="Sour Diesel Buds"/>	<b>Receive Qty.</b> <input type="text" value="12"/>	<input type="text" value="Ounces"/>	<input type="button" value="v"/>
<b>Package # 3</b>	<input type="text" value="ABCDEF012345670000013800"/> <input type="button" value="Q"/>	<b>Shipped Qty.</b> <input type="text" value="20"/>	<input type="text" value="ea"/>	<input type="checkbox"/> <b>Reject</b>
<b>Item</b>	<input type="text" value="Vape Cartridge"/>	<b>Receive Qty.</b> <input type="text" value="20"/>	<input type="text" value="Each"/>	<input type="button" value="v"/>
<b>Package # 4</b>	<input type="text" value="ABCDEF012345670000013801"/> <input type="button" value="Q"/>	<b>Shipped Qty.</b> <input type="text" value="25"/>	<input type="text" value="oz"/>	<input type="checkbox"/> <b>Reject</b>
<b>Item</b>	<input type="text" value="Shatter"/>	<b>Receive Qty.</b> <input type="text" value="25"/>	<input type="text" value="Ounces"/>	<input type="button" value="v"/>
<b>Package # 5</b>	<input type="text" value="ABCDEF012345670000013802"/> <input type="button" value="Q"/>	<b>Shipped Qty.</b> <input type="text" value="26"/>	<input type="text" value="ea"/>	<input type="checkbox"/> <b>Reject</b>
<b>Item</b>	<input type="text" value="Chocolate Chip Cookies"/>	<b>Receive Qty.</b> <input type="text" value="26"/>	<input type="text" value="Each"/>	<input type="button" value="v"/>
<b>Package # 6</b>	<input type="text" value="ABCDEF012345670000013803"/> <input type="button" value="Q"/>	<b>Shipped Qty.</b> <input type="text" value="15"/>	<input type="text" value="ea"/>	<input type="checkbox"/> <b>Reject</b>
<b>Item</b>	<input type="text" value="Chocolate Brownies"/>	<b>Receive Qty.</b> <input type="text" value="15"/>	<input type="text" value="Each"/>	<input type="button" value="v"/>

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Figure 8: Packages Created in Inventory

**meffc** Packages Transfers Sales Reports Admin

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**Packages**

**Active** On Hold Inactive

Tag	Harvest	Item	Category	Quantity
<input type="button" value="Q"/> ABCDEF012345670000013798		Blue Dream Buds	Buds	10 oz
<input type="button" value="Q"/> ABCDEF012345670000013799		Sour Diesel Buds	Buds	12 oz
<input type="button" value="Q"/> ABCDEF012345670000013800		Vape Cartridge	Extracts (each)	20 ea
<input type="button" value="Q"/> ABCDEF012345670000013801		Shatter	Extracts	25 oz
<input type="button" value="Q"/> ABCDEF012345670000013802		Chocolate Chip Cookies	Edibles	26 ea
<input type="button" value="Q"/> ABCDEF012345670000013803		Chocolate Brownies	Edibles	15 ea

### **Questions about Metrc functionality?**

Contact Metrc support at (877) 566-6506 or [support@metrc.com](mailto:support@metrc.com)

### **Questions about policies or rules regarding inventory transfer?**

Contact the OLCC at [marijuana@oregon.gov](mailto:marijuana@oregon.gov) or (503) 872-5000 (option 1)