

Medical Beginning Inventory Guidelines for Oklahoma



Overview

This document is intended to guide you through the process of tagging and reporting your medical beginning inventory in Metrc. Although, this guide is designed as a step-by-step tool, the information may be used at the discretion of your business processes. **The beginning inventory steps herein are not the same steps you will take to track your inventory in the system once your account is set up.**

There are two types of tagged inventory in Metrc: *Plants* and *Packages*.

Plants are Immature, Vegetative, or Flowering. All plants must enter the system through immature plant batches.

Packages are created from immature plants, harvest batches, waste, or other packages.

Beginning March 18th, 2021, you will be able to place a tag pre-order for each of your organization's licenses based on your inventory reporting needs. **Yellow** tags in Metrc designate the plants and packages for medical licensees. Each tag order will arrive and display your facility license number, name, and the unique identification number for that tag. On March 29th, all tag pre-orders will begin to be shipped to licensees who placed their orders first. Orders placed on or after March 29th will be processed and shipped after all tag pre-orders. **Please note for beginning inventory only, Metrc will not be expediting tag orders.**

After you have placed your tag order, all Grower, Processor, and Dispensary licensees must go into the Admin tab and add all the Strains and Items (products) that the business license is currently carrying. Lastly, you will need to add all locations for each license that indicate the location of plants and packages within your facility.

Metrc tags are one-time use ONLY. If an error is made when assigning a tag to a plant, that plant's tag must be replaced using the "Replace Tag" option in the software. If an error is made when assigning a tag to a package, the package quantity in question needs to be discontinued. Once discontinued, that package can be found within the inactive tab in the system. A new package would be created with a new package tag associated to it.

Further details on all Admin related setup and tagging corrections can be found in the Oklahoma Metrc Supplemental User Guide and is covered in the Metrc New Business Training classes which licensees can register for [here](#).

When reporting beginning inventory, newly created immature plant batches can be immediately transitioned to reflect the phase the plants are in (in the case of existing Vegetative and/or Flowering inventory).

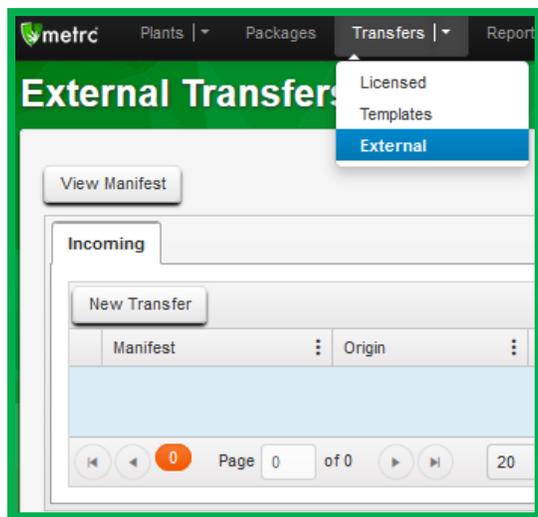
Harvested inventory is assigned a unique identifying harvest batch name within the system. It is considered a Metrc best practice for the harvest batch name to be the strain name of the harvested plants along with the date of the harvest. The weight of the product is reported based on the weight at harvest. Waste is reported from each harvest batch to account for all waste collected throughout the dry/cure process. Once the product is otherwise ready to transfer, it will need to be packaged within Metrc. Packages, once they have been tested by a licensed testing facility and have passed required compliance testing, can then be added to transfer manifests then transferred for further processing or sale.

Step-by-Step instructions begin on the next page.

External Incoming Transfers Steps

External Transfers are a two-step process which will require the user to go to the External Transfers Grid to create and receive the transfer into their active inventory. This process is intended for any license who has initial packaged inventory on hand. External incoming transfers should be used for all license inventory except live immature or mature plants in a Grower license. **You must complete both steps in order for the tagged packages to be reflected in your Metrc inventory.**

The two-step process is as follows:



Step 1: Creating an External Transfer

Once you have selected “External” under the Transfers tab on the navigation bar, click on “Incoming.” Create the incoming external transfer by clicking the “New Transfer” button (above image). This will bring up the screen (below image) where you will enter the required information to begin the process of receiving beginning inventory. You should complete the fields as follows:

Type: Select the Beginning Inventory Transfer option from the dropdown menu.

Phone Number: Enter a valid phone number. This can be designated as the business phone number.

Planned Route: This can be stated as “Received and weighed at the Licensed Business Number”.

Item Name, Quantity, and Packaged Date: These fields correspond to the specific items and quantities being transferred. The date packaged should be the day that you are entering the items into Metrc. The quantities should be exact and should account only for the product being received.

New Incoming Transfer

Type: Beginning Inventory Transfer

Phone No.: License Phone Number Here

Planned Route: All packages were weighed and/or counted at License Number XYZ. Verified by Metrc Admin.

Est. Departure: 01/10/2021 today, 10:00 PM

Est. Arrival: 01/10/2021 today, 10:00 PM

Package # 1: Cherry Tincture 100 mg (clear) Package Date: 01/10/2021 today

Quantity: 100 Each

1 (package)

Register Transfer Cancel

Creating a pending incoming transfer from Step 1 does not immediately associate Metrc package tags with those items. Without completing the transfer, a licensee will not show the proper inventory and will not be in compliance with inventory reconciliation requirements.

You must complete Step 2 (below) to complete the incoming external transfer, clicking “Register Transfer” does not create tagged packages in your inventory.

Step 2: Completing the External Transfer

Licensees **MUST** have package tags available to complete this step.

To create tagged packages, a licensee must complete the pending incoming transfer by clicking the “Complete” button to the far right and then 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 **Yellow** Metrc package tag to each item. The tag assigned to the product in the system should be physically affixed to the associated product.

Once the information is accurate and complete, click on the “Complete Transfer” button to create the packages with the specified quantities in your inventory.

External Transfers OK Lofly Rec-Producer A | 43-X

View Manifest

Incoming **Outgoing**

New Transfer

Manifest	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received	ETRD	ATRD	ETRA	ATRA
0000000501		Beginning Inventory Transfer	1	01/10/2021 10:00 pm		01/10/2021 10:00 pm						

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

Complete Incoming Transfer

Manifest: 0000000501 | Transfer Type: Beginning Inventory Transfer

Origin Lic. No.: | Origin Name: |
Main Phone No.: 1234567890 | Mobile Phone No.: |

Phone No. for Questions: |

Employee ID: | Vehicle Make: |
Driver's Name: | Vehicle Model: |
Driver's Lic. No.: | License Plate: |

Package # 1: ABCDEF012345670000012978 | Item: Cherry Tincture 100 mg | Shipped Qty: 100 ea | Reject
Location: Product Vault | Receive Qty: 100 Each

Complete Transfer | Cancel

Growers and Processors Only: Required Package Testing Entry

If a Grower or Processor has already conducted the required compliance panel testing on a package of beginning inventory, that business will be allowed to transfer those packages **for a limited time** without the test results requiring full entry into Metrc by a licensed laboratory. Any package that is going to be transferred without the tests being reported in Metrc must input a Package Note indicating the expected information for verification purposes.

Follow the steps below to apply a package note for inventory that was tested outside of Metrc.

Step 1: Within the Packages Grid, select the “Change Notes” button, which is located under the “Active” tab.

Change Notes

Package # 1 (clear)

Package: Type part of Package number... | Note: |

+ 1

Change Notes | Cancel

Step 2: Use the magnifying glass or type in the package you would like to input the note on

Step 3: Once you have the package(s), input the note indicating the following information

- Testing Lab Name
- Sample ID
- Harvest / Production Batch ID

The screenshot shows a 'Change Notes' dialog box with a close button (X) in the top right corner. The title bar reads 'Change Notes'. Below the title bar, there is a section for 'Package # 1' with a '(clear)' button to its right. Underneath, there is a 'Package' input field containing the ID '1A4FF010000012D000000004' and a magnifying glass icon. To the right of this is a 'Note' input field containing the text 'Testing Lab Name / Sample ID / F'. Below the input fields, there is a blue '+' button, a '1' in a box, and a '-' button. At the bottom of the dialog, there are two buttons: 'Change Notes' (highlighted in green) and 'Cancel'.

Please Note: If you have multiple packages that came from the same original batch, you can use the (+) icon (image below) to apply the same note and information to all packages where the test results apply to. If you would like to use the template option for packages in which the test results differ, you can use the (+) icon, but must enter unique notes for the relevant package(s).

The screenshot shows a 'Change Notes' dialog box with a close button (X) in the top right corner. The title bar reads 'Change Notes'. At the top, there is a green bar labeled 'Template' with a 'Note' input field containing 'Testing Lab Name / Sample ID / F' and a green checkmark icon. Below this, there are four sections for individual packages, labeled 'Package # 1' through 'Package # 4'. Each section has a blue '-' button to its right. Each package section contains a 'Package' input field with a unique ID and a magnifying glass icon, and a 'Note' input field containing 'Testing Lab Name / Sample ID / F'. At the bottom of the dialog, there is a blue '+' button, a '1' in a box, and a '-' button. At the very bottom, there are two buttons: 'Change Notes' (highlighted in green) and 'Cancel'.

Step 4: Verify the note in the History tab of the package(s)

Description	Employee	Date	Reported	Sources	External App
Packaged 100 Each of Cherry Tincture 100 mg - Package Type: Product - Location: Product Vault - Location Type: Default Location Type	METRC INDUSTRY ADMIN (X00•••)	03/07/2021	03/07/2021 08:52 pm	User	
Package added to Manifest # 0000002501 - From: External Entity - To: OK LOFTY ESTABLISHMENT, LLC (4a-X0001) - License Type: External Incoming - Transfer Type: Beginning Inventory Transfer	METRC INDUSTRY ADMIN (X00•••)	03/08/2021	03/07/2021 08:51 pm	User	
100 Each accepted from Manifest # 0000002501 by OK LOFTY ESTABLISHMENT, LLC (4a-X0001) - Location: Product Vault - Location Type: Default Location Type	METRC INDUSTRY ADMIN (X00•••)	03/08/2021	03/07/2021 08:52 pm	User	
Note: Harvest/Production Batch ID: Entered Here/COA Testing ID: Entered Here/Sample ID: Entered Here	METRC INDUSTRY ADMIN (X00•••)		03/07/2021 08:53 pm	User	

Growers Only: Live Plant Reporting

After completing the Incoming External Transfer (as described in the previous section), your licensed Metrc account should have all marijuana inventory reported within the license number other than any live immature or mature plants.

Seeds, clones, and plants that are currently growing under your license will now need to be entered within the Plants section of Metrc. All live plants, regardless of phase, will enter the Plants functionality as an Immature planting. If you are planning on **storing** seeds, meaning they would not be considered a live immature plant, then they would not need to be transitioned directly to the Plants section and should be reported as a package per the External Incoming Transfer section above.

Follow the steps below to move beginning inventory plants from the Immature Batch you created to the Vegetative or Flowering phases.

Step 1: In the Plants grid, go to the Immature Tab and select “Create Plantings.”

Create Plantings

Planting # 1 (clear)

Group Name: Blue Dream 4.1.21_Beginning In' Location: Immature Plant Room

Plants Type: Clone Strain: Blue Dream

Plants Count: 50 Planting Date: 04/01/2021 today

+ 1

Create Plantings Cancel

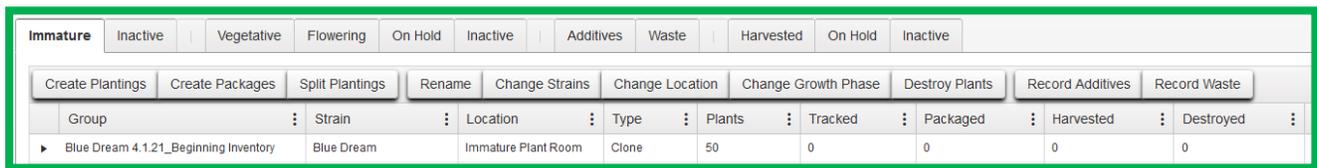
A preferred naming convention should be used for the Group Name. It is Metrc’s best practice recommendation for the Group Name to include the Strain Name and date of planting (or entry in the case of beginning inventory). The example (image above) would be how it is recommended to enter an immature plant batch of Blue Dream seeds for beginning inventory where the Group Name is labeled as **Blue Dream 12.15.21_Beginning Inventory**.

Strains and Locations must already have been entered under the Admin function on the navigation bar for selection here. Use today's date (the date of entry) for the "Planting Date." Once the information has been entered, click on "Create Plantings."

Step 2: Select the relevant Immature Batch by clicking on it, then select "Change Growth Phase."

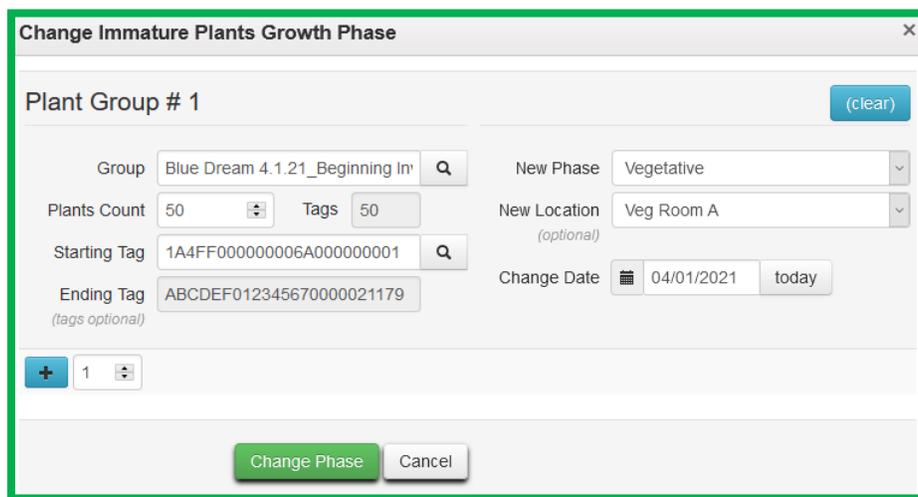


Group	Strain	Location	Type	Plants	Tracked	Packaged	Harvested	Destroyed	Group Date
Blue Dream 4.1.21_Beginning Inventory	Blue Dream	Immature Plant Room	Clone	50	0	0	0	0	04/01/2021



Group	Strain	Location	Type	Plants	Tracked	Packaged	Harvested	Destroyed	Group Date
Blue Dream 4.1.21_Beginning Inventory	Blue Dream	Immature Plant Room	Clone	50	0	0	0	0	04/01/2021

Step 3: Populate the required information and select "Change Phase."



Change Immature Plants Growth Phase

Plant Group # 1 (clear)

Group: Blue Dream 4.1.21_Beginning In

Plants Count: 50 Tags: 50

Starting Tag: 1A4FF000000006A000000001

Ending Tag: ABCDEF012345670000021179 (tags optional)

New Phase: Vegetative

New Location: Veg Room A (optional)

Change Date: 04/01/2021 today

1

Change Phase Cancel

Please note that once plants are transitioned to the vegetative state in Metrc, applying tags is not optional. Within the "Change Immature Plants Growth Phase" dialog box (pictured above) licensees can sequentially apply tags to the total number of plants transitioning phases. Alternatively, the plant tags can be individually assigned directly within the vegetative section.

Fill in the information top to bottom, left to right. That way you will have populated the Plants Count prior to selecting a Starting Tag from your available tags in the system. Doing it in this way allows the system to then auto-populate that number of tags in sequence for your use in identifying your beginning plants inventory. The physical plant tag must match the same tag they have been assigned in the Metrc system. Locations must already have been entered under the Admin function on the navigation bar for selection here. Use today's date (the date of entry) for the "Growth Date".

Once you have entered all your plant inventory and updated it to its correct state, continue to track and update additional changes of your plants' development or phase changes as they occur. E.g., Vegetative Phase to Flowering Phase or Flowering Phase to Harvest.

Please reach out to the Metrc Support Team at support@metrc.com or 1-877-566-6506 with any questions or for additional support. Guidance information can also be found underneath the "Support" dropdown in Metrc.