Intermediary Stop
Metrc Transfer Guide

Introduction

In January of 2020, the Oregon Liquor Control Commission adopted changes to Oregon Administrate Rules Chapter 845, Division 25. These include general clarifications and changes regarding how recreational marijuana licensees should generate manifests in CTS. These changes also specifically address how licensees must generate manifests with respect to the practice of "cold calling" or "hopscotching" product from one location to multiple destinations. (Referred to as "cold calling" throughout this guide.)

This refers to the practice of a licensee or representative leaving a facility with several different packages of marijuana items that they are planning to take to several different licensees as potential buyers who may wish to purchase the product.

This guide details how cold calling to intermediary stops must be done to remain in compliance with OLCC rules. To remain compliant, licensees may only undertake the activities described in this guide if:

- The "route" as recorded on the manifest in CTS includes the trade name, license number, address, and estimated arrival time for _**each**_ licensed premises that will be visited as an intermediary stop;
- The amount of marijuana in the vehicle is no greater than:
  - 25 pounds of usable marijuana;
  - 1 pound of concentrate or extract; and
  - 1,000 units of any individual cannabinoid product;
- All marijuana items are delivered to licensees or returned to the originating location within 60 hours of departure from the originating licensee; and
- All overnight stops are identified in the manifest route.

Cold calling to intermediary stops is done by a licensee creating a "circular manifest" to themselves, in which the same license number is both the originating and receiving license. The licensee will fill in the planned route information on the manifest with the complete route including directions and each licensed premises that is intended to be stopped at during the trip.

During the cold call, if the intermediary licensee(s) (the licensees who are the potential buyers) decide to receive the packages, the shipping license must edit the manifest to remove the specific packages that the licensee will receive and immediately generate a new manifest directly to the licensee that the shipping licensee representative is currently stopped at. Before leaving the premises, the shipping licensee should verify that this newly generated manifest has been recorded as received in CTS by the recipient licensee.

**Editing the manifest in this manner is only permitted while the marijuana items subject to the change are physically located within the licensed premises of the intermediary stop.**

Below you will find this process outlined using screen shots and notes related to how the manifests should be generated, edited, and completed. It is important that these steps are followed whenever this specific type of transfer takes place so as to maintain compliance with Oregon Administrative Rules.

Process Overview

The following sections will detail the process. As an overview, licensees will need to perform the following steps when engaging in this practice:

- Record the "circular" manifest
  - Include all items that will be "out for delivery."
  - Include all locations (including trade name, license number, address, and estimated time of arrival at each intermediary stop) you plan to visit in the route.
  - Include any overnight stops, such as hotel stays.
- Perform cold calls to the listed destinations
- If a destination accepts some of the transported items:
  - Edit the circular manifest to remove those items.
  - Immediately record a new manifest to the receiving licensee that includes those same items.
  - Verify that the packages have been accepted in CTS.
  - Proceed to the next destination.
- If a destination accepts all remaining transported items:
  - Reject all packages on the circular manifest.
  - Record all rejected items as received.
  - Immediately record a new manifest to the receiving licensee that includes those same items.
  - Verify that the packages have been accepted in CTS.
- If not all marijuana items have been delivered to other licensees after the last stop:
  - Return to your licensed premises.
  - Accept all packages remaining on the circular manifest.
  - Return the marijuana items to the secure storage location(s) on the licensed premises.

Generating the "Circular" Manifest

When you generate the manifest, you will need to list your license number as the destination license number. In the planned route, you'll need to include the specific route details and include all intermediary stops in the route, as shown below. The intermediary stops in this case would be the other licensed premises that you are planning on stopping at. You'll need to list the Trade Name, License number, Address and Estimated Arrival Time for each premises visited on the manifest. You'll then add the packages to the manifest that you are planning on taking with you during the transport.

Only full packages may be delivered. This means each UID you add to the manifest should be no larger of a package than the smallest amount you may want to deliver. For example, if you have 25 packages of

usable marijuana of one pound each under 25 different UID package tags, you may not deliver only a half-pound. Ensure that you have packaged all items in the smallest units that will be delivered. You will not be able to repackage until the items have physically returned to your licensed premises.

Modifying the "Circular" Manifest after Arrival at a Stop

When you arrive at a stop on the circular manifest, and the license decides to purchase some of the packages that you have available, you will then go into your outgoing manifests section and click on the "edit" button to edit the circular manifest. It is important to remember that this is the only situation where you are allowed to edit a manifest that has already left your licensed premises. No other manifests may be edited or voided once they have left your facility.

Once you click the "edit" button on the manifest, you'll be brought to a screen similar to the one below. You'll hit the black "-" button next to the package number(s) that the licensee has decided to purchase from you. Note that this can only be done while the driver and packages are physically located at the licensed premises purchasing the products.

In this example, we will remove packages 3 and 4 in the below image.

You'll then go to your licensed outgoing transfers section and generate a new manifest by clicking "New Transfer":
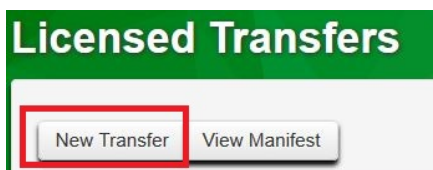
On the new manifest you are generating, you will add the packages that were removed from the original manifest in the previous step. The following information should be entered:

- The destination of this newly generated manifest will be the intermediary stop to which you are delivering the package(s).
- Within the planned route you will reference the original circular manifest from which the package(s) were removed, e.g. "packages taken off manifest XXX at intermediary stop."
- The Estimated Departure and Estimated Arrival should be left as the pre-generated dates and times on the manifest.

Once the new manifest is configured, you'll register the transfer and the receiving licensee can receive the product into their inventory.

Completing the "Circular" Manifest Transfer
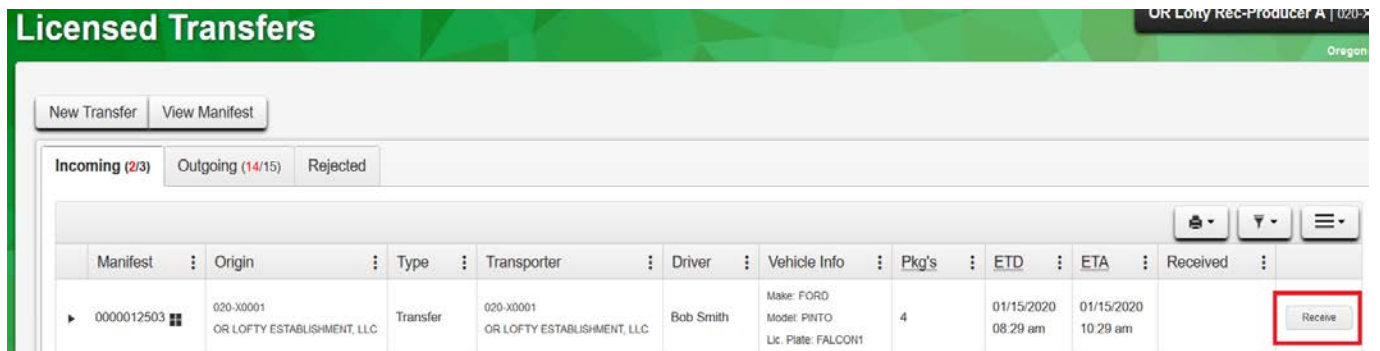
All circular manifests will terminate in one of two ways:

1) You will return to your licensed premises with packages left over that no licensed stop wanted to buy, or
2) One of your stops will want all of the packages that are remaining on the circular manifest.

Each of these two scenarios are described below with the proper method of completing the transfer and "closing out" the manifest.

Remember that manifests cannot be voided once they leave your facility!

Returning to the originating premises with remaining packages

In this scenario, you have made all the stops along the planned route and there are packages on the manifest remaining that were not purchased. Upon returning to the originating licensed premises within the required 60 hours, you will need to receive them back into your facility in order to properly reconcile your Metrc data. To do so, go to your licensed incoming transfers section and click on the "Receive" button.

When the next screen appears you will then confirm the quantities in each of the remaining packages and accept them back into your facility. When the current weights have been confirmed, click on the green "receive" button.

The circular manifest must be received in order to put the packages back in your active inventory!

Receive Licensed Transfer   ✕

Manifest	0000012503	Transfer Type	Transfer
Origin Lic. No.	020-X0001	Origin Name	OR LOFTY ESTABLISHMENT, LI
Main Phone No.	+1-800-420-MAIN	Mobile Phone No.	+1-800-420-CELL
Transporter Lic. No.	020-X0001	Transporter Name	OR LOFTY ESTABLISHMENT, LI
Employee ID	XW123AB	Vehicle Make	FORD
Driver's Name	Bob Smith	Vehicle Model	PINTO
Driver's Lic. No.	1234567	License Plate	FALCON1
Phone No. for Questions	503-502-5555		

Template   ☐ Reject ✔

Package # 1 1A4FF0300000001000000112 🔍   Item Ace of Spades Buds   Shipped Qty. 3927.7 g ☐ Reject

Receive Qty. 3927.7 Grams

Package # 2 1A4FF0300000001000000114 🔍   Item AK-47 Pre-Rolls   Shipped Qty. 1995.8048 g ☐ Reject

Receive Qty. 1995.8048 Grams

[Receive Transfer]   [Cancel]

An intermediary stop wants to accept the final package(s) on the manifest

In this scenario, you arrive at one of the stops along the manifest's planned route and the licensee wants to accept all of the remaining packages on the manifest. If you try to remove all the packages from the manifest as described on page 5 of this guide, you will receive an error message stating that a package must be on the manifest.

There are two options to prevent this error, as explained below.

Option 1: Instead of editing the manifest, you'll instead need to reject the circular manifest, receive the rejected manifest back into your inventory, and then create a new manifest directly to the licensee receiving the packages.

Click on the "receive" button in your incoming licensed transfers section of Metrc.

When you go to reject the circular manifest, you'll record the reason as "Circular Manifest – Final Stop."
Record the note as "Manifest XXXX rejected to send product to License YYYY" (Where "XXXX is the actual
manifest number and "YYYY" is the license number of the license to whom the next manifest will be
generated). You can use the green "template" section to select the reject box, reject reason and note
section and then click the green check boxes to the right of each option to flow it down to the packages.

Once you've rejected the packages, click on "receive transfer."

The rejected packages can then be added to a new manifest going to the correct license number listed
on the previous manifest.

When you add the packages to the new manifest, you will enter the license number of the intermediary stop that is accepting the transfer as the destination on the manifest. The times of Estimated Departure (ETD) and Estimated Arrival (ETA) listed on the manifest should be left as the ETD and ETA that is pre-generated when the manifest is created. In the manifest, complete the planned route with a statement of "packages taken off manifest XXXX at intermediary stop" (where "XXXX" is the original manifest that was rejected in the previous step). Once you've filled out the manifest correctly, register the transfer and the receiving license can accept it into their inventory.

Option 2: Take more than you plan to sell on the circular manifest.

Another way to avoid having to reject a circular manifest with packages on it is to include more packages on your manifest than you intend to sell.

For example, on the manifest you may include a "show case" that you intend to display but not offer for sale. This package would be taken into each intermediary stop to display (e.g. show the quality of the product and set up future sales calls or trade samples), but would never be left behind and would therefore remain on the manifest until arriving back at the originating licensed premises.

Similarly, if a normal sales trip contains 20 packages in the vehicle, you could add a 21st package that remains in the vehicle throughout the trip and is never taken into intermediary stops for sale. This package would act as "placeholder" on the manifest so that you can remove the other packages without any issues.

Important: _Only include packages on the manifest that are physically in the vehicle!_

Any "placeholder" package would need to be physically in the vehicle and meet all transport requirements while en route.

Once you return to your facility after the circular manifest trip has concluded, you would simply receive all remaining packages back into your active inventory for use on another manifest in the future.

For questions or more information:

Reach out to our CTS Compliance Team at:
      503-872-5190
      Marijuana.CTS@Oregon.gov

Visit the Oregon Metrc Wiki

Reach out to Metrc Support at:
      1-877-566-6506
      Support@Metrc.com