Medical Marijuana Dispensary Permit Application

You may apply for one dispensary permit in this application for any of the medical marijuana regions listed below. A separate application must be submitted for each primary dispensary location sought by the applicant. Please see the Medical Marijuana Organization Permit Application Instructions for a table of the counties within each medical marijuana region and the counties in which you are eligible to locate your primary dispensary.

Please check to indicate the medical marijuana region, and specify the county, for which you are applying for a dispensary permit:

☒ Northwest
☐ Southwest
☐ Northcentral
☐ Southcentral
☐ Northeast
☐ Southeast

County 1 (Primary Dispensary Location): Erie
County 2 (if applicable): 
County 3 (if applicable): 

Pennsylvania Department of Health
Medical Marijuana Regions

[Map of Pennsylvania showing regions]
# Medical Marijuana Dispensary Permit Application

## Part A - Applicant Identification and Dispensary Information

(Scoring Method: Pass/Fail)

For this part, the applicant is required to provide background and contact information for the business or individual applying for a dispensary permit, the primary dispensary location, along with any second or third dispensary locations that are being sought under the application.

## Section 1 – Applicant Name, Address and Contact Information

### Business or Individual Name and Principal Address

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Name</td>
<td>Consortium Pennsylvania, LLC</td>
<td>1150 First Ave, Suite 511</td>
<td>King of Prussia</td>
<td>PA</td>
<td>19406</td>
</tr>
</tbody>
</table>

Primary Contact

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Contact</td>
<td>Ken Foltz</td>
</tr>
</tbody>
</table>

## Section 2 – Dispensary Information

The applicant is required to provide a primary dispensary location. The applicant may include a second or third location under this application. A second or third dispensary may be added to a dispensary permit at a later date through the filing of an application for additional dispensary locations.

By checking “Yes,” you affirm that you possess the ability to obtain in an expeditious manner the right to use sufficient land, buildings and other premises and equipment to properly carry on the activity described in the medical marijuana dispensary permit application, and any proposed location for a dispensary.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Primary Dispensary Location (please indicate dispensary name as you would like it to appear on the dispensary permit)
**Pennsylvania Department of Health**  
**Medical Marijuana Dispensary Permit Application**

<table>
<thead>
<tr>
<th>Facility Name:</th>
<th>Knox Medical</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Address:</strong></td>
<td>3857 Peach Street</td>
</tr>
<tr>
<td><strong>City:</strong></td>
<td>Erie</td>
</tr>
<tr>
<td><strong>State:</strong></td>
<td>PA</td>
</tr>
<tr>
<td><strong>Zip Code:</strong></td>
<td>16509</td>
</tr>
<tr>
<td><strong>County:</strong></td>
<td>Erie</td>
</tr>
<tr>
<td><strong>Municipality:</strong></td>
<td>Erie</td>
</tr>
</tbody>
</table>

**PLEASE PROVIDE A DESCRIPTION OF THE PUBLIC ACCESS TO THE DISPENSARY LOCATION, INCLUDING ANY LOCAL PUBLIC TRANSPORTATION THAT MAY BE AVAILABLE:**

The Knox Medical location in Erie, PA is centrally located on Peach Street (U.S. 19) and is easily accessible from all directions. The location is approximately 1 mile south of U.S. 20, approximately 3.5 miles north of Interstate 90, an approximately 4 miles from Interstate 79. The location is on the east side of Peach Street (U.S. 19), between West 38th Street and Liberty Street and can be accessed from either the north-bound or south-bound lanes of Peach Street (U.S. 19). The location is easily accessible from public transportation options with Erie Public Transportation bus stations for Routes 1, 4 and 15 all within 1 mile of the location.

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**Second Dispensary Location**

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<tr>
<th>Facility Name:</th>
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<tr>
<td><strong>Address:</strong></td>
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<td><strong>City:</strong></td>
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<td><strong>State:</strong></td>
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<tr>
<td><strong>Zip Code:</strong></td>
</tr>
<tr>
<td><strong>County:</strong></td>
</tr>
<tr>
<td><strong>Municipality:</strong></td>
</tr>
</tbody>
</table>

**PLEASE PROVIDE A DESCRIPTION OF THE PUBLIC ACCESS TO THE DISPENSARY LOCATION, INCLUDING ANY LOCAL PUBLIC TRANSPORTATION THAT MAY BE AVAILABLE:**

Please limit your response to no more than 5,000 words.

---

**Third Dispensary Location**

<table>
<thead>
<tr>
<th>Facility Name:</th>
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<tbody>
<tr>
<td><strong>Address:</strong></td>
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<td><strong>City:</strong></td>
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<td><strong>State:</strong></td>
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<td><strong>Zip Code:</strong></td>
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<tr>
<td><strong>County:</strong></td>
</tr>
<tr>
<td><strong>Municipality:</strong></td>
</tr>
</tbody>
</table>

**PLEASE PROVIDE A DESCRIPTION OF THE PUBLIC ACCESS TO THE DISPENSARY LOCATION, INCLUDING ANY LOCAL PUBLIC TRANSPORTATION THAT MAY BE AVAILABLE:**

Please limit your response to no more than 5,000 words.

---

**Part B – Diversity Plan**  
**(Scoring Method: 100 Points)**

In accordance with Section 615 of the Act (35 P.S. § 10231.615), an applicant shall include with its application a Diversity Plan that promotes and ensures the involvement of diverse participants and diverse

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**Pennsylvania Department of Health**
Diverse Participants include a person, including a natural person; individuals from diverse racial, ethnic, and cultural backgrounds and communities; women; veterans; individuals with disabilities; corporation; partnership; association; trust or other entity; or any combination thereof, who are seeking a permit issued by the Department of Health to grow and process or dispense medical marijuana. Diverse groups include the following businesses that have been certified by a third-party certifying organization: a disadvantaged business, minority-owned business, and women-owned business as those terms are defined in 74 Pa. C.S. § 303(b); and a service-disabled veteran-owned small business or veteran-owned small business as those terms are defined in 51 Pa. C.S. § 9601.

Section 3 – Diversity Plan

By checking “Yes,” the applicant affirms that it has a diversity plan that establishes a goal of opportunity and access in employment and contracting by the medical marijuana organization. The applicant also affirms that it will make a good faith effort to meet the diversity goals outlined in the diversity plan. Changes to the diversity plan must be approved by the Department of Health in writing.

The applicant further agrees to report participation level and involvement of diverse participants and diverse groups in the form and frequency required by the Department, and to provide any other information the Department deems appropriate regarding ownership, management, employment, and contracting opportunities by diverse participants and diverse groups.

Diversity Plan

In narrative form below, describe a plan that establishes a goal of diversity in ownership, management, employment, and contracting to ensure that diverse participants and diverse groups are accorded equality of opportunity. To the extent available, include the following:

1. The diversity status of the Principals, Operators, Financial Backers, and Employees of the Medical Marijuana Organization.
2. An official affirmative action plan for the Medical Marijuana Organization.
3. Internal diversity goals adopted by the Medical Marijuana Organization.
4. A plan for diversity-oriented outreach or events the Medical Marijuana Organization will conduct during the term of the permit.
5. Contracts with diverse groups and the expected percentage and dollar amount of revenues that will be paid to the diverse groups.
6. Any materials from the Medical Marijuana Organization’s mentoring, training, or professional development programs for diverse groups.
7. Any other information that demonstrates the Medical Marijuana Organization’s commitment to diversity practices.
8. A workforce utilization report including the following information for each job category within the Medical Marijuana Organization:
   a. The total number of persons employed in each job category,
   b. The total number of men employed in each job category,
   c. The total number of women employed in each job category,
   d. The total number of veterans in each job category,
   e. The total number of service-disabled veterans in each job category, and
   f. The total number of members of each racial minority employed in each job category.

9. A narrative description of your ability to record and report on the components of the diversity plan.

Please limit your response to no more than 5,000 words.

Part C – Applicant Background Information

(Scoring Method: Pass/Fail)

For this part the applicant is required to provide background and contact information for the principals, financial backers, operators and employees.

Section 4 – Principals, Financial Backers, Operators and Employees

A. Please list all Principals, Financial Backers and Operators

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<thead>
<tr>
<th>Name and Residential Address</th>
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<tbody>
<tr>
<td>First Name:</td>
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<tr>
<td>Occupation:</td>
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<td>Also known as:</td>
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</table>
Pennsylvania Department of Health  
Medical Marijuana Dispensary Permit Application

Phone:  Fax:  Email:  

**Name and Residential Address**

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<thead>
<tr>
<th>First Name:</th>
<th>Middle Name:</th>
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<th>Suffix:</th>
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<td>Occupation:</td>
<td>Title in the applicant’s business:</td>
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IF MORE SPACE IS REQUIRED, PLEASE SUBMIT ADDITIONAL INFORMATION ON OTHER INDIVIDUALS IN A SEPARATE DOCUMENT TITLED “PRINCIPALS, FINANCIAL BACKERS AND OPERATORS (CONTD.)” IN ACCORDANCE WITH THE ATTACHMENT FILE NAME FORMAT REQUIREMENTS AND INCLUDE IT WITH THE ATTACHMENTS.

B. Please list Employees

PLEASE PROVIDE THE FOLLOWING INFORMATION FOR ANY EMPLOYEES THAT HAVE BEEN HIRED TO DATE TO WORK FOR THE APPLICANT LISTED IN THIS APPLICATION. IF NO EMPLOYEES ARE CURRENTLY EMPLOYED, PLEASE LEAVE THIS SECTION BLANK.

**Name and Residential Address**

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</table>

**IF MORE SPACE IS REQUIRED, PLEASE SUBMIT ADDITIONAL INFORMATION ON OTHER INDIVIDUALS IN A SEPARATE DOCUMENT TITLED “EMPLOYEES (CONT'D)” IN ACCORDANCE WITH THE ATTACHMENT FILE NAME FORMAT REQUIREMENTS AND INCLUDE IT WITH THE ATTACHMENTS.**

### Section 5 – Moral Affirmation

By checking “Yes,” you affirm that each principal, financial backer, operator and employee listed in this permit application is of good moral character.  

- Yes [ ]  
- No [ ]

### Section 6 – Compliance with Applicable Laws and Regulations

By checking “Yes,” you affirm that you, as well as the principals, financial backers, operators and employees listed in this permit application are able to continuously comply with all applicable Commonwealth laws and regulations relating to the operation of a medical marijuana dispensary.  

- Yes [ ]  
- No [ ]
Section 7 – Civil and Administrative Action

For the statements below:

- By checking “Yes,” you affirm the statement
- If you check “No,” you must state your reasoning in “Schedule A” below

<table>
<thead>
<tr>
<th>Civil and Administrative Action</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>The applicant has never responded to an action resulting in sanctions, disciplinary actions or civil monetary penalties being imposed relating to a registration, license, permit or any other authorization to grow, process or dispense medical marijuana in any state.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The applicant has never responded to a civil or administrative action relating to a registration, license, permit or authorization to grow, process or dispense medical marijuana in any state.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The applicant has never been accused of obtaining a registration, license, permit or other authorization to operate as a grower, processor or dispensary of medical marijuana in any jurisdiction by fraud, misrepresentation, or the submission of false information.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No civil or administrative action has been taken against the applicant under the laws of the Commonwealth or any other state, the United States or a military, territorial or tribal authority relating to a principal, operator, financial backer or employee of the applicant’s profession, or occupation or fraudulent practices, including fraudulent billing practices.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Schedule A: Civil or Administrative History Incident

<table>
<thead>
<tr>
<th>Defendant</th>
<th>Name of Case &amp; Docket #</th>
<th>Nature of Charge or Complaint</th>
<th>Date of Charge or Complaint</th>
<th>Disposition</th>
<th>Name and Address of the Administrative Agency Involved, and the Tribunal or Court</th>
</tr>
</thead>
<tbody>
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Part D – Plan of Operation

(Scoring Method: 550 Points)

A PLAN OF OPERATION IS REQUIRED FOR ALL DISPENSARY PERMIT APPLICATIONS. THE PLAN OF OPERATION MUST INCLUDE A TIMETABLE OUTLINING THE STEPS THE APPLICANT WILL TAKE TO BECOME OPERATIONAL WITHIN SIX MONTHS FROM THE DATE OF ISSUANCE OF A PERMIT. THE PLAN OF OPERATION MUST ALSO DESCRIBE HOW THE APPLICANT’S PROPOSED
Plan of Operation

What must be covered in a Plan of Operation?

Applicants must identify how they will comply with relevant laws and regulations regarding:

- Security and Surveillance
- Employee qualifications and training
- Transportation of medical marijuana and medical marijuana products
- Storage of medical marijuana products
- Inventory management
- Recordkeeping
- Prevention of unlawful diversion of medical marijuana and medical marijuana products
- A timetable outlining the steps required for the applicant to become operational within six months from the date of issuance of a dispensary permit

By checking “Yes,” you affirm that you are able to continuously maintain effective security, surveillance and accounting control measures to prevent diversion, abuse and other illegal conduct regarding medical marijuana and medical marijuana products.

Section 8 – Operational Timetable

If issued a permit, please describe the steps and timeframes for becoming fully operational as a dispensary within six months from the date of issuance of a dispensary permit. Specifically, please provide the steps you will take to begin the process for the handling, storing, and transporting of medical marijuana and medical marijuana products.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Estimated Date</th>
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</table>
Pennsylvania Department of Health  
Medical Marijuana Dispensary Permit Application

IF MORE SPACE IS REQUIRED FOR THE OPERATIONAL TIMETABLE, PLEASE SUBMIT ADDITIONAL INFORMATION IN A SEPARATE DOCUMENT TITLED “OPERATIONAL TIMETABLE (CONTD.)” IN ACCORDANCE WITH THE ATTACHMENT FILE NAME FORMAT REQUIREMENTS AND INCLUDE IT WITH THE ATTACHMENTS.

Section 9 – Employee Qualifications, Description of Duties and Training

<table>
<thead>
<tr>
<th>A. PLEASE PROVIDE A DESCRIPTION OF THE DUTIES, RESPONSIBILITIES, AND ROLES OF EACH PRINCIPAL, FINANCIAL BACKER, OPERATOR AND EMPLOYEE.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
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<td>2.</td>
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<table>
<thead>
<tr>
<th>B. PLEASE DESCRIBE THE EMPLOYEE QUALIFICATIONS OF EACH PRINCIPAL AND EMPLOYEE.</th>
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</thead>
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</tbody>
</table>
Pennsylvania Department of Health  
Medical Marijuana Dispensary Permit Application

C. Please describe the steps the applicant will take to assure that each principal and employee will meet the two-hour training requirement under the Act and regulations.

1. [Blank]

2. [Blank]

3. [Blank]

4. [Blank]

5. [Blank]

6. [Blank]

7. [Blank]

8. [Blank]

If more space is required for any of the above three components of Section 9 (A, B and C), please submit additional information in a separate document titled “Employee Qualifications, Description of Duties and Training (Contd.)” in accordance with the attachment file name format requirements and include it with the attachments.

D. Licensed Medical Professionals at Facility

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>A physician or a pharmacist will be present at the primary dispensary location listed in this permit application at all times during the hours the primary dispensary facility is open to dispense or to offer to dispense medical marijuana to patients and caregivers.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>If the applicant is operating any dispensaries in addition to the primary dispensary location listed under the permit, and a physician or pharmacist is not present onsite at the additional dispensary or dispensaries, a physician assistant or a certified registered nurse practitioner will be present onsite at each of the other dispensaries instead of a physician or pharmacist.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Any physician, pharmacist, physician assistant or certified registered nurse practitioner employed by a dispensary will, prior to assuming any duties at the dispensary facility, successfully complete a four-hour training course developed by the Department.</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

Please provide an explanation of any responses above that were answered as a “No” and how you will meet these requirements by the time the department determines you to be operational under the Act and regulations:
Section 10 – Security and Surveillance

A dispensary must have security and surveillance systems, utilizing commercial-grade equipment, to prevent unauthorized entry and to prevent and detect diversion, theft, or loss of any medical marijuana or medical marijuana products.

Please provide a summary of your proposed security and surveillance equipment and measures that will be in place at your proposed facility and site. These measures should cover, but are not limited to, the following: General overview of the equipment, measures and procedures to be used, alarm systems, surveillance system, storage, recording capability, records retention, premises accessibility, and inspection/servicing/alteration protocols.

Please limit your response to no more than 5,000 words.

Section 11 – Transportation of Medical Marijuana

<table>
<thead>
<tr>
<th>A. Transportation</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>By checking “Yes,” you affirm that any delivery of medical marijuana to any other medical marijuana organization or approved laboratory within the Commonwealth will adhere to the following:</td>
<td></td>
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</tr>
<tr>
<td>If you check “No” to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations.</td>
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<tr>
<td>• Medical marijuana will only be delivered between 7 a.m. and 9 p.m.</td>
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<tr>
<td>• Medical marijuana will not be transported to any location outside of this Commonwealth.</td>
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<tr>
<td>• A global positioning system will be used to ensure safe, efficient delivery of the medical marijuana to a medical marijuana organization.</td>
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<tr>
<td>In addition to having a transport vehicle staffed with a delivery team consisting of at least two individuals, the applicant affirms the following:</td>
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<tr>
<td>• At least one delivery team member will remain with the vehicle at all times that the vehicle contains medical marijuana.</td>
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</tr>
<tr>
<td>• Each delivery team member shall have access to a secure form of communication with the dispensary, such as a cellular telephone, at all times that the vehicle contains medical marijuana.</td>
<td>☐ ☐</td>
<td></td>
</tr>
<tr>
<td>• Upon demand, each delivery team member shall produce an identification badge or card to the Department or its authorized agents, law enforcement or other Federal, State, or local government officials if necessary to perform the government officials’ functions and duties.</td>
<td>☐ ☐</td>
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</tr>
<tr>
<td>• Each delivery team member will have a valid driver’s license.</td>
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<tr>
<td>• While on duty, a delivery team member will not wear any clothing or symbols that may indicate ownership or possession of medical marijuana.</td>
<td>☐ ☐</td>
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<tr>
<td>• Medical marijuana stored inside the transport vehicle may not be visible from the outside of the transport vehicle.</td>
<td>☐ ☐</td>
<td></td>
</tr>
<tr>
<td>• A delivery team shall proceed in a transport vehicle from the dispensary, where the medical marijuana is loaded, directly to the medical marijuana organization, where the medical marijuana is unloaded, without unnecessary delays. Notwithstanding the foregoing, a transport vehicle may make stops at multiple facilities, as appropriate, to deliver medical marijuana.</td>
<td>☐ ☐</td>
<td></td>
</tr>
<tr>
<td>• Any vehicle accidents, diversions, losses, or other reportable events that occur during transport of medical marijuana must be immediately reported to the Department either through a designated phone line established by the Department or by electronic communication with the Department in a manner prescribed by the Department.</td>
<td>☐ ☐</td>
<td></td>
</tr>
<tr>
<td>• The Department shall be notified daily of the dispensary’s delivery schedule, including routes and delivery times, either through a designated phone line established by the Department or by electronic communication with the Department in a manner prescribed by the Department.</td>
<td>☐ ☐</td>
<td></td>
</tr>
<tr>
<td>• A transport vehicle is subject to inspection by the Department or its authorized agents, law enforcement or other Federal, State or local government officials if necessary to perform the government officials’ functions and duties.</td>
<td>☐ ☐</td>
<td></td>
</tr>
<tr>
<td>• A transport vehicle may be stopped and inspected along its delivery route or at any medical marijuana organization.</td>
<td>☐ ☐</td>
<td></td>
</tr>
<tr>
<td>• If a third-party contractor is used, the contractor must comply with all the transportation requirements listed in the Act and regulations.</td>
<td>☐ ☐</td>
<td></td>
</tr>
</tbody>
</table>
B. Transport Manifest

<table>
<thead>
<tr>
<th>Requirements</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>By checking “Yes” to any statement, you affirm that the transport manifest (printed or electronic) that accompanies every transport vehicle will contain the following information and meet the following requirements:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If you check “No” to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The name, address and permit number of the medical marijuana organization receiving the delivery, and the name of and contact information for a representative of the medical marijuana organization.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The quantity, by weight or unit, of each medical marijuana harvest batch, harvest lot or process lot contained in the transport, along with the identification number for each harvest batch, harvest lot or process lot.</td>
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<td></td>
</tr>
<tr>
<td>The date and approximate time of departure.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The date and approximate time of arrival.</td>
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<td></td>
</tr>
<tr>
<td>The transport vehicle’s make, model, and license plate number.</td>
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<td></td>
</tr>
<tr>
<td>The identification number of each member of the delivery team accompanying the transport.</td>
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</tr>
<tr>
<td>When a delivery team delivers medical marijuana to multiple medical marijuana organizations, the transport manifest must correctly reflect the specific medical marijuana in transit; each recipient will also provide the dispensary with a printed receipt for the medical marijuana received.</td>
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</tr>
<tr>
<td>All medical marijuana being transported must be packaged in shipping containers and labeled in accordance with §§ 1151.34 and 1161.28 (relating to packaging and labeling of medical marijuana; and labels and safety inserts).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Separate copies of the transport manifest will be provided to each recipient receiving the medical marijuana product described in the transport manifest. To maintain confidentiality, a dispensary may prepare separate manifests for each recipient.</td>
<td></td>
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</tr>
</tbody>
</table>
Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

- The applicant acknowledges that, upon request, a copy of the printed transport manifest, and any printed receipts for medical marijuana being transported, will be provided to the Department or its authorized agents, law enforcement, or other Federal, State, or local government officials if necessary to perform the government officials’ functions and duties.

PLEASE PROVIDE AN EXPLANATION OF ANY RESPONSES ABOVE THAT WERE ANSWERED AS A “NO” AND HOW YOU WILL MEET THESE REQUIREMENTS BY THE TIME THE DEPARTMENT DETERMINES YOU TO BE OPERATIONAL UNDER THE ACT AND REGULATIONS:

Please limit your response to no more than 5,000 words.

C. PLEASE DESCRIBE YOUR PLAN REGARDING THE TRANSPORTATION OF MEDICAL MARIJUANA AND MEDICAL MARIJUANA PRODUCTS. FOR EXAMPLE, EXPLAIN WHETHER YOU PLAN TO MAINTAIN YOUR OWN TRANSPORTATION OPERATION AS PART OF THE FACILITY OPERATION, OR WHETHER YOU WILL USE A THIRD-PARTY CONTRACTOR. IF YOU CHOOSE TO USE YOUR OWN TRANSPORTATION OPERATION, PLEASE PROVIDE THE NUMBER AND TYPE OF VEHICLES THAT WILL BE USED TO TRANSPORT MEDICAL MARIJUANA AND MEDICAL MARIJUANA PRODUCTS, THE TRAINING THAT WILL BE PROVIDED TO EMPLOYEES THAT WILL TRANSPORT MEDICAL MARIJUANA AND MEDICAL MARIJUANA PRODUCTS, AND ANY ADDITIONAL MEASURES YOU WILL TAKE TO PREVENT DIVERSION DURING TRANSPORT. IF YOU WILL BE USING A THIRD-PARTY CONTRACTOR FOR TRANSPORTING MEDICAL MARIJUANA AND MEDICAL MARIJUANA PRODUCTS, PLEASE EXPLAIN THE STEPS YOU WILL TAKE TO GUARANTEE THE THIRD-PARTY CONTRACTOR WILL BE COMPLIANT WITH THE TRANSPORTATION REQUIREMENTS UNDER THE ACT AND REGULATIONS:

Please limit your response to no more than 5,000 words.

Section 12 – Storage of Medical Marijuana

A. Storage Requirements

By checking “Yes” to any statement, you affirm that the plan of operation will address the below statements:

If you check “No” to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations.

- There will be separate, locked, limited access areas for the storage of medical marijuana that is expired, damaged, deteriorated, mislabeled, contaminated, recalled, or whose containers or packaging have been opened or breached, until

<table>
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<th>Yes</th>
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</tbody>
</table>
the medical marijuana is returned to a grower/processor, destroyed or otherwise disposed of, as required by § 1151.40 (relating to the management and disposal of medical marijuana waste).

- All storage areas will be maintained in a clean and orderly condition and free from infestation by insects, rodents, birds, and pests.
- A separate and secure area for temporary storage of medical marijuana that is awaiting disposal will be established.

Please provide an explanation of any responses above that were answered as a “No” and how you will meet these requirements by the time the Department determines you to be operational under the Act and regulations:

Please limit your response to no more than 5,000 words.

B. Please describe your plans regarding the storage of medical marijuana and medical marijuana products within your facility:

Please limit your response to no more than 5,000 words.

Section 13 – Labeling of Medical Marijuana Products

A. Labeling Requirements

By checking “Yes” to any statement, you affirm that the applicant will implement a quality control process to ensure that the label does not bear any of the following:

If you check “No” to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations.

- Any resemblance to the trademarked, characteristic or product-specialized packaging of any commercially available food or beverage product.
- Any statement, artwork or design that could reasonably lead an individual to believe that the package contains anything other than medical marijuana.
- Any seal, flag, crest, coat of arms, or other insignia that could reasonably mislead an individual to believe that the product has been endorsed, manufactured, or approved for use by any State, county or municipality or any agency thereof.
Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

- Any cartoon, color scheme, image, graphic or feature that might make the package attractive to children.

Please provide an explanation of any responses above that were answered as a "No" and how you will meet these requirements by the time the department determines you to be operational under the act and regulations:

Please limit your response to no more than 5,000 words.

B. Please describe your process for creating and monitoring the labeling used for medical marijuana products:

Please limit your response to no more than 5,000 words.

Section 14 – Inventory Management

A. Electronic Tracking System

You acknowledge that you must use the electronic tracking system prescribed by the Department containing the requirements in section 701 of the Act (35 P.S. § 10231.701).

You acknowledge that an electronic tracking system that is approved by the Department will be deployed to log, verify and monitor the receipt of medical marijuana product from a grower/processor, the verification of the validity of an identification card presented by a patient or caregiver, the dispensing of medical marijuana product to a patient or caregiver, the disposal of medical marijuana waste and the recall of defective medical marijuana.

B. Inventory Management

By checking "Yes" to any statement, you affirm that each dispensary will maintain the following inventory data in its electronic tracking system:

If you check "No" to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations:

- Medical marijuana received from a grower/processor.
Please provide an explanation of any responses above that were answered as a “No” and how you will meet these requirements by the time the department determines you to be operational under the Act and regulations:

Please limit your response to no more than 5,000 words.

C. Please describe your approach regarding the implementation of an inventory management process. This approach must also include a process that provides for the recall of medical marijuana products and the management of medical marijuana product returns from you to the originating grower/processor:

Please limit your response to no more than 5,000 words.

Section 15 – Diversion Prevention

A. Please provide a summary of the procedures that you will implement at each proposed facility for the prevention of the unlawful diversion of medical marijuana and medical marijuana products, along with the process that will be followed when evidence of theft/diversion is identified:

Please limit your response to no more than 5,000 words.

Section 16 – Sanitation and Safety

A. Please provide a summary of the intended sanitation and safety measures to be implemented at each proposed facility listed in the permit application. These measures should cover, but are not be limited
Pennsylvania Department of Health  
Medical Marijuana Dispensary Permit Application

TO, THE FOLLOWING: A WRITTEN PROCESS FOR CONTAMINATION PREVENTION, PEST PROTECTION PROCEDURES, MEDICAL MARIJUANA PRODUCT HANDLER RESTRICTIONS, AND HAND-WASHING FACILITIES.

Please limit your response to no more than 5,000 words.

Section 17 – Recordkeeping

A. PLEASE PROVIDE A SUMMARY OF YOUR RECORDKEEPING PLAN AT EACH PROPOSED FACILITY LISTED IN THE PERMIT APPLICATION. THIS PLAN SHOULD COVER, BUT IS NOT LIMITED TO, RECORDS OF INVENTORY AND ALL DISPENSING TRANSACTIONS:

Please limit your response to no more than 5,000 words.

Part E – Applicant Organization, Ownership, Capital and Tax Status  
(Scoring Method: 150 Points)

SECTION 18 – ORGANIZATIONAL STRUCTURE

<table>
<thead>
<tr>
<th>Applicant’s Form of Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check One</td>
</tr>
<tr>
<td>□ C-Corporation</td>
</tr>
<tr>
<td>□ Sole Proprietorship</td>
</tr>
<tr>
<td>□ Limited Liability Limited Partnership</td>
</tr>
<tr>
<td>□ S-Corporation</td>
</tr>
<tr>
<td>□ Partnership</td>
</tr>
<tr>
<td>□ Limited Liability Company</td>
</tr>
<tr>
<td>□ Non-Profit Organization</td>
</tr>
<tr>
<td>□ Other (explain):</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Applicant’s Organization Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>State of Incorporation or Registration:</td>
</tr>
<tr>
<td>Business Name on Formation Documents:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Applicant’s Identification Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Employer ID number:</td>
</tr>
<tr>
<td>PA Unemployment Compensation Account Number:</td>
</tr>
<tr>
<td>PA Department of Revenue Tax number (if applicant is currently doing business in Pennsylvania):</td>
</tr>
<tr>
<td>PA Workers’ Compensation Policy Number (if applicant is currently doing business in Pennsylvania):</td>
</tr>
</tbody>
</table>
The applicant affirms that workers’ compensation insurance will be obtained by the time the Department determines you to be operational under the Act and regulations.  

**SECTION 19 – BUSINESS HISTORY AND CAPACITY TO OPERATE**

Describe your business history and your ability and plan to maintain a successful and financially sustainable operation:

Please limit your response to no more than 5,000 words.

**SECTION 20 – CURRENT OFFICERS**

Provide the position, title in the applicant’s business, and address information for all current officers, directors, partners or trustees.

<table>
<thead>
<tr>
<th>Name and Residential Address</th>
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</tr>
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<tbody>
<tr>
<td>First Name:</td>
<td>Middle Name:</td>
</tr>
<tr>
<td>Occupation:</td>
<td>Title in the applicant’s business:</td>
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<tr>
<td>Also known as:</td>
<td>Date of birth: MM/DD/YYYY</td>
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<td>Address Line 1:</td>
<td>Address Line 2:</td>
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Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

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<th>First Name:</th>
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<tbody>
<tr>
<td>Occupation:</td>
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<tr>
<td>Address Line 3:</td>
<td>City:</td>
<td>State:</td>
<td>Zip Code:</td>
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<td>Phone:</td>
<td>Fax:</td>
<td>Email:</td>
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</tr>
<tr>
<td>Phone:</td>
<td>Fax:</td>
<td>Email:</td>
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</table>

If more space is required, please submit additional information on additional officers in a separate document titled “Current Officers (Contd.)” in accordance with the attachment file name format requirements and include it with the attachments.

SECTION 21 – OWNERSHIP

In this section, list all persons with a controlling interest in the business, defined as follows:

1. For a publicly traded company, voting rights that entitle a person to elect or appoint one or more of the members of the board of directors or other governing board, or the ownership or beneficial holding of 5% or more of the securities of the publicly traded company.
2. For a privately held entity, the ownership of any security in the entity.

Complete the appropriate section(s) below:

A. FOR C-CORPORATIONS, S-CORPORATIONS, LLCS AND LLLCS

Name and Residential Address

<table>
<thead>
<tr>
<th>First Name:</th>
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<tbody>
<tr>
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<td>Zip Code:</td>
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<tr>
<td>Phone:</td>
<td>Fax:</td>
<td>Email:</td>
<td></td>
</tr>
<tr>
<td>Stock type or class:</td>
<td>Number of shares held:</td>
<td>Date Acquired:</td>
<td>Percentage of outstanding voting stock:</td>
</tr>
<tr>
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</table>

**Name and Residential Address**

First Name: | Middle Name: | Last Name: | Suffix: |
--- | --- | --- | --- |
Occupation: | | | |
Also known as: | Title in the applicant’s business: | | |
Address Line 1: | Address Line 2: | | |
Address Line 3: | City: | State: | Zip Code: |
Phone: | Fax: | Email: |

**Name and Residential Address**

First Name: | Middle Name: | Last Name: | Suffix: |
--- | --- | --- | --- |
Occupation: | | | |
Also known as: | Date of birth: MM/DD/YYYY | | |
Address Line 1: | Address Line 2: | | |
Address Line 3: | City: | State: | Zip Code: |
Phone: | Fax: | Email: |

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--- | --- | --- | --- |
Occupation: | | | |
Also known as: | Date of birth: MM/DD/YYYY | | |
Address Line 1: | Address Line 2: | | |
Address Line 3: | City: | State: | Zip Code: |
Phone: | Fax: | Email: |

**Name and Residential Address**

First Name: | Middle Name: | Last Name: | Suffix: |
--- | --- | --- | --- |
Occupation: | | | |
Also known as: | Date of birth: MM/DD/YYYY | | |
Address Line 1: | Address Line 2: | | |
Address Line 3: | City: | State: | Zip Code: |
Phone: | Fax: | Email: |
<table>
<thead>
<tr>
<th>Stock type or class:</th>
<th>Number of shares held:</th>
<th>Date Acquired:</th>
<th>Percentage of outstanding voting stock:</th>
<th>Terms, conditions, rights and privileges:</th>
</tr>
</thead>
</table>

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<th>First Name:</th>
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Medical Marijuana Dispensary Permit Application

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B. FOR PARTNERSHIPS AND LLPs

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Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

| Limited Partner | MM/DD/YYYY |
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Pennsylvania
DEPARTMENT OF HEALTH
# Medical Marijuana Dispensary Permit Application

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C. OTHER PERSONS HOLDING AN INTEREST IN THE PROPOSED SITE OR FACILITY

List any other persons holding an interest in the proposed site or facility, that are otherwise not disclosed in sections A or B.

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Nature, type, terms and conditions of the interest in the applicant:

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Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

Address Line 3: ___________________________ City: ___________________________ State: ___________________________ Zip Code: ___________________________

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SECTION 22 – CAPITAL REQUIREMENTS

PROVIDE A SUMMARY OF YOUR AVAILABLE CAPITAL AND AN ESTIMATED SPENDING PLAN TO BE USED FOR YOU TO BECOME OPERATIONAL WITHIN SIX MONTHS FROM THE DATE OF ISSUANCE OF THE PERMIT:

Please limit your response to no more than 5,000 words.

Part F – Community Impact
(Scoring Method: 100 Points)

SECTION 23 – COMMUNITY IMPACT

PLEASE BE ADVISED, INDICATION OF SUPPORT FROM PUBLIC OFFICIALS WILL NOT BE CONSIDERED WHEN EVALUATING THIS SECTION.
PROVIDE A SUMMARY OF HOW THE APPLICANT INTENDS TO HAVE A POSITIVE IMPACT ON THE COMMUNITY WHERE ITS OPERATIONS ARE PROPOSED TO BE LOCATED:

Please limit your response to no more than 5,000 words.
Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

TERMS ARE DEFINED IN 51 PA. C.S. § 9601.

Section 3 – Diversity Plan

By checking “Yes,” the applicant affirms that it has a diversity plan that establishes a goal of opportunity and access in employment and contracting by the medical marijuana organization. The applicant also affirms that it will make a good faith effort to meet the diversity goals outlined in the diversity plan. Changes to the diversity plan must be approved by the Department of Health in writing.

The applicant further agrees to report participation level and involvement of Diverse Participants and Diverse Groups in the form and frequency required by the Department, and to provide any other information the Department deems appropriate regarding ownership, management, employment, and contracting opportunities by Diverse Participants and Diverse Groups.

DIVERSITY PLAN

IN NARRATIVE FORM BELOW, DESCRIBE A PLAN THAT ESTABLISHES A GOAL OF DIVERSITY IN OWNERSHIP, MANAGEMENT, EMPLOYMENT AND CONTRACTING TO ENSURE THAT DIVERSE PARTICIPANTS AND DIVERSE GROUPS ARE ACCORDED EQUALITY OF OPPORTUNITY. TO THE EXTENT AVAILABLE, INCLUDE THE FOLLOWING:

1. The diversity status of the Principals, Operators, Financial Backers, and Employees of the Medical Marijuana Organization.
2. An official affirmative action plan for the Medical Marijuana Organization.
3. Internal diversity goals adopted by the Medical Marijuana Organization.
4. A plan for diversity-oriented outreach or events the Medical Marijuana Organization will conduct during the term of the permit.
5. Contracts with diverse groups and the expected percentage and dollar amount of revenues that will be paid to the diverse groups.
6. Any materials from the Medical Marijuana Organization’s mentoring, training, or professional development programs for diverse groups.
7. Any other information that demonstrates the Medical Marijuana Organization’s commitment to diversity practices.
8. A workforce utilization report including the following information for each job category within the Medical Marijuana Organization:
   a. The total number of persons employed in each job category,
   b. The total number of men employed in each job category,
   c. The total number of women employed in each job category,
   d. The total number of veterans in each job category,
   e. The total number of service-disabled veterans in each job category, and
   f. The total number of members of each racial minority employed in each job category.
9. A narrative description of your ability to record and report on the components of the diversity plan.

Please limit your response to no more than 5,000 words.

Part C – Applicant Background Information

(Scoring Method: Pass/Fail)

For this part the applicant is required to provide background and contact information for the principals, financial backers, operators and employees.

Section 4 – Principals, Financial Backers, Operators and Employees (SEE ATTACHED)

A. Please list all Principals, Financial Backers and Operators

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Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

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**B. Please list Employees**

Please provide the following information for any employees that have been hired to date to work for the applicant listed in this application. If no employees are currently employed, please leave this section blank.

<table>
<thead>
<tr>
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IF MORE SPACE IS REQUIRED, PLEASE SUBMIT ADDITIONAL INFORMATION ON OTHER INDIVIDUALS IN A SEPARATE DOCUMENT TITLED “PRINCIPALS, FINANCIAL BACKERS AND OPERATORS (CONT'D)” IN ACCORDANCE WITH THE ATTACHMENT FILE NAME FORMAT REQUIREMENTS AND INCLUDE IT WITH THE ATTACHMENTS.
Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

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IF MORE SPACE IS REQUIRED, PLEASE SUBMIT ADDITIONAL INFORMATION ON OTHER INDIVIDUALS IN A SEPARATE DOCUMENT TITLED “EMPLOYEES (CONTD.)” IN ACCORDANCE WITH THE ATTACHMENT FILE NAME FORMAT REQUIREMENTS AND INCLUDE IT WITH THE ATTACHMENTS.

Section 5 – Moral Affirmation

By checking “Yes,” you affirm that each principal, financial backer, operator and employee listed in this permit application is of good moral character.

Yes □ No □

Section 6 – Compliance with Applicable Laws and Regulations

By checking “Yes,” you affirm that you, as well as the principals, financial backers, operators and employees listed in this permit application are able to continuously comply with all applicable Commonwealth laws and regulations relating to the operation of a medical marijuana dispensary.

Yes □ No □

Section 7 – Civil and Administrative Action

(SEE ATTACHED - CIVIL AND ADMINISTRATIVE ACTION)

For the statements below:

- By checking “Yes,” you affirm the statement
- If you check “No,” you must state your reasoning in “Schedule A” below

<table>
<thead>
<tr>
<th>Civil and Administrative Action</th>
<th>Yes</th>
<th>No</th>
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pennsylvania
DEPARTMENT OF HEALTH
Pennsylvania Department of Health  
Medical Marijuana Dispensary Permit Application

The applicant has never responded to an action resulting in sanctions, disciplinary actions or civil monetary penalties being imposed relating to a registration, license, permit or any other authorization to grow, process or dispense medical marijuana in any state. ☒ ☐

The applicant has never responded to a civil or administrative action relating to a registration, license, permit or authorization to grow, process or dispense medical marijuana in any state. ☒ ☐

The applicant has never been accused of obtaining a registration, license, permit or other authorization to operate as a grower, processor or dispensary of medical marijuana in any jurisdiction by fraud, misrepresentation, or the submission of false information. ☒ ☐

No civil or administrative action has been taken against the applicant under the laws of the Commonwealth or any other state, the United States or a military, territorial or tribal authority relating to a principal, operator, financial backer or employee of the applicant’s profession, or occupation or fraudulent practices, including fraudulent billing practices. ☒ ☐

Schedule A: Civil or Administrative History Incident

<table>
<thead>
<tr>
<th>Defendant</th>
<th>Name of Case &amp; Docket #</th>
<th>Nature of Charge or Complaint</th>
<th>Date of Charge or Complaint</th>
<th>Disposition</th>
<th>Name and Address of the Administrative Agency Involved, and the Tribunal or Court</th>
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Part D – Plan of Operation  
(Scoring Method: 550 Points)

A PLAN OF OPERATION IS REQUIRED FOR ALL DISPENSARY PERMIT APPLICATIONS. THE PLAN OF OPERATION MUST INCLUDE A TIMETABLE OUTLINING THE STEPS THE APPLICANT WILL TAKE TO BECOME OPERATIONAL WITHIN SIX MONTHS FROM THE DATE OF ISSUANCE OF A PERMIT. THE PLAN OF OPERATION MUST ALSO DESCRIBE HOW THE APPLICANT’S PROPOSED BUSINESS OPERATIONS WILL COMPLY WITH STATUTORY AND REGULATORY REQUIREMENTS NECESSARY FOR THE CONTINUED OPERATION OF THE FACILITY.

Plan of Operation

What must be covered in a Plan of Operation?

Applicants must identify how they will comply with relevant laws and regulations regarding:
Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

- Security and Surveillance
- Employee qualifications and training
- Transportation of medical marijuana and medical marijuana products
- Storage of medical marijuana products
- Inventory management
- Recordkeeping
- Prevention of unlawful diversion of medical marijuana and medical marijuana products
- A timetable outlining the steps required for the applicant to become operational within six months from the date of issuance of a dispensary permit

By checking “Yes,” you affirm that you are able to continuously maintain effective security, surveillance and accounting control measures to prevent diversion, abuse and other illegal conduct regarding medical marijuana and medical marijuana products.

Yes ☒ No ☐

Section 8 – Operational Timetable

If issued a permit, please describe the steps and timeframes for becoming fully operational as a dispensary within six months from the date of issuance of a dispensary permit. Specifically, please provide the steps you will take to begin the process for the handling, storing, and transporting of medical marijuana and medical marijuana products.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Estimated Date</th>
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<tr>
<td>See Operational Time Table Contd.</td>
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<tr>
<td>See attached Operational Time Table</td>
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If more space is required for the Operational Timetable, please submit additional information in a separate document titled “Operational Timetable (Contd.)” in accordance with the attachment file name format requirements and include it with the attachments.
### Section 9 – Employee Qualifications, Description of Duties and Training

**A.** Please provide a description of the duties, responsibilities, and roles of each principal, financial backer, operator and employee.

1. See Attached Section 9 A.

2. 

3. 

4. 

5. 

6. 

7. 

8. 

**B.** Please describe the employee qualifications of each principal and employee.

1. See Attached Section 9 B.

2. 

3. 

4. 

5. 

6. 

7. 

8. 

**C.** Please describe the steps the applicant will take to assure that each principal and employee will meet the two-hour training requirement under the Act and regulations.

1. See Attached Section 9 C.
Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

2. 
3. 
4. 
5. 
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8. 

If more space is required for any of the above three components of Section 9 (A, B and C), please submit additional information in a separate document titled “Employee Qualifications, Description of Duties and Training (Contd.)” in accordance with the attachment file name format requirements and include it with the attachments.

<table>
<thead>
<tr>
<th>D. Licensed Medical Professionals at Facility</th>
<th>Yes</th>
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<tbody>
<tr>
<td>A physician or a pharmacist will be present at the primary dispensary location listed in this permit application at all times during the hours the primary dispensary facility is open to dispense or to offer to dispense medical marijuana to patients and caregivers.</td>
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<tr>
<td>If the applicant is operating any dispensaries in addition to the primary dispensary location listed under the permit, and a physician or pharmacist is not present onsite at the additional dispensary or dispensaries, a physician assistant or a certified registered nurse practitioner will be present onsite at each of the other dispensaries instead of a physician or pharmacist.</td>
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<tr>
<td>Any physician, pharmacist, physician assistant or certified registered nurse practitioner employed by a dispensary will, prior to assuming any duties at the dispensary facility, successfully complete a four-hour training course developed by the Department.</td>
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Please provide an explanation of any responses above that were answered as a “No” and how you will meet these requirements by the time the Department determines you to be operational under the Act and regulations:

Please limit your response to no more than 5,000 words.
Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

Section 10 – Security and Surveillance
A DISPENSARY MUST HAVE SECURITY AND SURVEILLANCE SYSTEMS, UTILIZING COMMERCIAL-GRADE EQUIPMENT, TO PREVENT UNAUTHORIZED ENTRY AND TO PREVENT AND DETECT DIVERSION, THEFT, OR LOSS OF ANY MEDICAL MARIJUANA OR MEDICAL MARIJUANA PRODUCTS.

Please provide a summary of your proposed security and surveillance equipment and measures that will be in place at your proposed facility and site. These measures should cover, but are not limited to, the following: general overview of the equipment, measures and procedures to be used, alarm systems, surveillance system, storage, recording capability, records retention, premises accessibility, and inspection/servicing/alteration protocols.

Please see attached Security and Surveillance narrative.

Section 11 – Transportation of Medical Marijuana

<table>
<thead>
<tr>
<th>A. Transportation</th>
<th>Yes</th>
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<tr>
<td>By checking “Yes,” you affirm that any delivery of medical marijuana to any other medical marijuana organization or approved laboratory within the Commonwealth will adhere to the following:</td>
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<tr>
<td>If you check “No” to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations.</td>
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- Medical marijuana will only be delivered between 7 a.m. and 9 p.m. (X) (☐)
- Medical marijuana will not be transported to any location outside of this Commonwealth. (X) (☐)
- A global positioning system will be used to ensure safe, efficient delivery of the medical marijuana to a medical marijuana organization. (X) (☐)

In addition to having a transport vehicle staffed with a delivery team consisting of at least two individuals, the applicant affirms the following:

- At least one delivery team member will remain with the vehicle at all times that the vehicle contains medical marijuana. (X) (☐)
- Each delivery team member shall have access to a secure form of communication with the dispensary, such as a cellular telephone, at all times that the vehicle contains medical marijuana. (X) (☐)
Pennsylvania Department of Health  
Medical Marijuana Dispensary Permit Application

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<tr>
<th>Requirement</th>
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<tr>
<td>Upon demand, each delivery team member shall produce an identification badge or card to the Department or its authorized agents, law enforcement or other Federal, State, or local government officials if necessary to perform the government officials’ functions and duties.</td>
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<td>Each delivery team member will have a valid driver’s license.</td>
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<tr>
<td>While on duty, a delivery team member will not wear any clothing or symbols that may indicate ownership or possession of medical marijuana.</td>
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<td>Medical marijuana stored inside the transport vehicle may not be visible from the outside of the transport vehicle.</td>
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<td>A delivery team shall proceed in a transport vehicle from the dispensary, where the medical marijuana is loaded, directly to the medical marijuana organization, where the medical marijuana is unloaded, without unnecessary delays. Notwithstanding the foregoing, a transport vehicle may make stops at multiple facilities, as appropriate, to deliver medical marijuana.</td>
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<td>Any vehicle accidents, diversions, losses, or other reportable events that occur during transport of medical marijuana must be immediately reported to the Department either through a designated phone line established by the Department or by electronic communication with the Department in a manner prescribed by the Department.</td>
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<tr>
<td>The Department shall be notified daily of the dispensary’s delivery schedule, including routes and delivery times, either through a designated phone line established by the Department or by electronic communication with the Department in a manner prescribed by the Department.</td>
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<td>A transport vehicle is subject to inspection by the Department or its authorized agents, law enforcement or other Federal, State or local government officials if necessary to perform the government officials’ functions and duties.</td>
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<tr>
<td>A transport vehicle may be stopped and inspected along its delivery route or at any medical marijuana organization.</td>
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<tr>
<td>If a third-party contractor is used, the contractor must comply with all the transportation requirements listed in the Act and regulations.</td>
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B. Transport Manifest

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<th>Requirement</th>
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 pennsylvania  
DEPARTMENT OF HEALTH
By checking “Yes” to any statement, you affirm that the transport manifest (printed or electronic) that accompanies every transport vehicle will contain the following information and meet the following requirements:

If you check “No” to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations.

- The name, address and permit number of the medical marijuana organization receiving the delivery, and the name of and contact information for a representative of the medical marijuana organization.

- The quantity, by weight or unit, of each medical marijuana harvest batch, harvest lot or process lot contained in the transport, along with the identification number for each harvest batch, harvest lot or process lot.

- The date and approximate time of departure.

- The date and approximate time of arrival.

- The transport vehicle’s make, model, and license plate number.

- The identification number of each member of the delivery team accompanying the transport.

- When a delivery team delivers medical marijuana to multiple medical marijuana organizations, the transport manifest must correctly reflect the specific medical marijuana in transit; each recipient will also provide the dispensary with a printed receipt for the medical marijuana received.

- All medical marijuana being transported must be packaged in shipping containers and labeled in accordance with §§ 1151.34 and 1151.28 (relating to packaging and labeling of medical marijuana; and labels and safety inserts).

- Separate copies of the transport manifest will be provided to each recipient receiving the medical marijuana product described in the transport manifest. To maintain confidentiality, a dispensary may prepare separate manifests for each recipient.

- The applicant acknowledges that, upon request, a copy of the printed transport manifest, and any printed receipts for medical marijuana being transported, will be provided to the Department or its authorized agents, law enforcement, or other Federal, State, or local government officials if necessary to perform the government officials’ functions and duties.
Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

PLEASE PROVIDE AN EXPLANATION OF ANY RESPONSES ABOVE THAT WERE ANSWERED AS A “NO” AND HOW YOU WILL MEET THESE REQUIREMENTS BY THE TIME THE DEPARTMENT DETERMINES YOU TO BE OPERATIONAL UNDER THE ACT AND REGULATIONS:

Click here to enter text.

C. PLEASE DESCRIBE YOUR PLAN REGARDING THE TRANSPORTATION OF MEDICAL MARIJUANA AND MEDICAL MARIJUANA PRODUCTS. FOR EXAMPLE, EXPLAIN WHETHER YOU PLAN TO MAINTAIN YOUR OWN TRANSPORTATION OPERATION AS PART OF THE FACILITY OPERATION, OR WHETHER YOU WILL USE A THIRD-PARTY CONTRACTOR. IF YOU CHOOSE TO USE YOUR OWN TRANSPORTATION OPERATION, PLEASE PROVIDE THE NUMBER AND TYPE OF VEHICLES THAT WILL BE USED TO TRANSPORT MEDICAL MARIJUANA AND MEDICAL MARIJUANA PRODUCTS, THE TRAINING THAT WILL BE PROVIDED TO EMPLOYEES THAT WILL TRANSPORT MEDICAL MARIJUANA AND MEDICAL MARIJUANA PRODUCTS, AND ANY ADDITIONAL MEASURES YOU WILL TAKE TO PREVENT DIVERSION DURING TRANSPORT. IF YOU WILL BE USING A THIRD-PARTY CONTRACTOR FOR TRANSPORTING MEDICAL MARIJUANA AND MEDICAL MARIJUANA PRODUCTS, PLEASE EXPLAIN THE STEPS YOU WILL TAKE TO GUARANTEE THE THIRD-PARTY CONTRACTOR WILL BE COMPLIANT WITH THE TRANSPORTATION REQUIREMENTS UNDER THE ACT AND REGULATIONS:

Please see attached Transportation narrative.

Section 12 – Storage of Medical Marijuana

A. Storage Requirements

By checking “Yes” to any statement, you affirm that the plan of operation will address the below statements:

If you check “No” to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations.

- There will be separate, locked, limited access areas for the storage of medical marijuana that is expired, damaged, deteriorated, mislabeled, contaminated, recalled, or whose containers or packaging have been opened or breached, until the medical marijuana is returned to a grower/processor, destroyed or otherwise disposed of, as required by § 1151.40 (relating to the management and disposal of medical marijuana waste).

- All storage areas will be maintained in a clean and orderly condition and free from infestation by insects, rodents, birds, and pests.
A separate and secure area for temporary storage of medical marijuana that is awaiting disposal will be established.

Please provide an explanation of any responses above that were answered as a “No” and how you will meet these requirements by the time the Department determines you to be operational under the Act and regulations: 

Please limit your response to no more than 5,000 words.

B. Please describe your plans regarding the storage of medical marijuana and medical marijuana products within your facility:

Please see attached Storage narrative.

Section 13 – Labeling of Medical Marijuana Products

A. Labeling Requirements

By checking “Yes” to any statement, you affirm that the applicant will implement a quality control process to ensure that the label does not bear any of the following:

If you check “No” to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations.

- Any resemblance to the trademarked, characteristic or product-specialized packaging of any commercially available food or beverage product.
- Any statement, artwork or design that could reasonably lead an individual to believe that the package contains anything other than medical marijuana.
- Any seal, flag, crest, coat of arms, or other insignia that could reasonably mislead an individual to believe that the product has been endorsed, manufactured, or approved for use by any State, county or municipality or any agency thereof.
- Any cartoon, color scheme, image, graphic or feature that might make the package attractive to children.

Please provide an explanation of any responses above that were answered as a “No” and how you will meet these requirements by the time the Department determines you to be operational under the Act and regulations:
Please limit your response to no more than 5,000 words.

B. PLEASE DESCRIBE YOUR PROCESS FOR CREATING AND MONITORING THE LABELING USED FOR MEDICAL MARIJUANA PRODUCTS:

Please see attached Labeling narrative.

Section 14 – Inventory Management

<table>
<thead>
<tr>
<th>A. Electronic Tracking System</th>
<th>Yes</th>
<th>No</th>
</tr>
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<tbody>
<tr>
<td>You acknowledge that you must use the electronic tracking system prescribed by the Department containing the requirements in section 701 of the Act (35 P.S. § 10231.701).</td>
<td>☒</td>
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</tr>
<tr>
<td>You acknowledge that an electronic tracking system that is approved by the Department will be deployed to log, verify and monitor the receipt of medical marijuana product from a grower/processor, the verification of the validity of an identification card presented by a patient or caregiver, the dispensing of medical marijuana product to a patient or caregiver, the disposal of medical marijuana waste and the recall of defective medical marijuana.</td>
<td>☒</td>
<td>☐</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B. Inventory Management</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>By checking “Yes” to any statement, you affirm that each dispensary will maintain the following inventory data in its electronic tracking system:</td>
<td>☒</td>
<td>☐</td>
</tr>
<tr>
<td>If you check “No” to any statement, you must state the reasoning for doing so at the end of this section. If issued a permit, you must be able to affirm each statement by the time the Department determines you to be operational under the Act and regulations.</td>
<td>☒</td>
<td>☐</td>
</tr>
<tr>
<td>• Medical marijuana received from a grower/processor.</td>
<td>☒</td>
<td>☐</td>
</tr>
<tr>
<td>• Medical marijuana dispensed to a patient or caregiver.</td>
<td>☒</td>
<td>☐</td>
</tr>
<tr>
<td>• Damaged, defective, expired, or contaminated medical marijuana awaiting return to a grower/processor or awaiting disposal.</td>
<td>☒</td>
<td>☐</td>
</tr>
</tbody>
</table>
Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

- Inventory controls and procedures will be established for the conducting of monthly inventory reviews and annual comprehensive inventories of medical marijuana at the facility. ☒ ☐

- The written or electronic record will include the date of the inventory, a summary of the inventory findings, and the employee identification numbers and titles or positions of the individuals who conducted the inventory. ☒ ☐

Please provide an explanation of any responses above that were answered as a “No” and how you will meet these requirements by the time the department determines you to be operational under the Act and regulations:

Please limit your response to no more than 5,000 words.

C. Please describe your approach regarding the implementation of an inventory management process. This approach must also include a process that provides for the recall of medical marijuana products and the management of medical marijuana product returns from you to the originating grower/processor:

Please see attached Inventory Management narrative.

Section 15 – Diversion Prevention

A. Please provide a summary of the procedures that you will implement at each proposed facility for the prevention of the unlawful diversion of medical marijuana and medical marijuana products, along with the process that will be followed when evidence of theft/diversion is identified:

Please see attached Diversion Program narrative.

Section 16 – Sanitation and Safety

A. Please provide a summary of the intended sanitation and safety measures to be implemented at each proposed facility listed in the permit application. These measures should cover, but are not be limited to, the following: a written process for contamination prevention, pest protection procedures, medical marijuana product handler restrictions, and hand-washing facilities.
PLEASE SEE ATTACHED SANITATION AND SAFETY NARRATIVE.

Section 17 – Recordkeeping

A. PLEASE PROVIDE A SUMMARY OF YOUR RECORDKEEPING PLAN AT EACH PROPOSED FACILITY LISTED IN THE PERMIT APPLICATION. THIS PLAN SHOULD COVER, BUT IS NOT LIMITED TO, RECORDS OF INVENTORY AND ALL DISPENSING TRANSACTIONS:

Please see attached Recordkeeping narrative.
### Part E – Applicant Organization, Ownership, Capital and Tax Status
(Scoring Method: 150 Points)

#### SECTION 18 – ORGANIZATIONAL STRUCTURE

<table>
<thead>
<tr>
<th>Applicant’s Form of Organization</th>
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<tbody>
<tr>
<td>Check One</td>
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<tr>
<td>☐ C-Corporation</td>
</tr>
<tr>
<td>☐ Sole Proprietorship</td>
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<tr>
<td>☐ Limited Liability Limited Partnership</td>
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<table>
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<tr>
<th>Applicant’s Organization Documents</th>
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<tbody>
<tr>
<td>State of Incorporation or Registration: Pennsylvania</td>
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<tr>
<td>Business Name on Formation Documents: Cansortium Pennsylvania, LLC</td>
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<tr>
<td>Federal Employer ID number: 82-06655658</td>
</tr>
<tr>
<td>PA Department of Revenue Tax number (if applicant is currently doing business in Pennsylvania): Will obtain prior to becoming operational under the Act and regulations</td>
</tr>
</tbody>
</table>

The applicant affirms that workers’ compensation insurance will be obtained by the time the Department determines you to be operational under the Act and regulations. ✓ Yes □ No
**SECTION 19 – BUSINESS HISTORY AND CAPACITY TO OPERATE**

Describe your business history and your ability and plan to maintain a successful and financially sustainable operation:

Please limit your response to no more than 5,000 words.

**SECTION 20 – CURRENT OFFICERS  (SEE ATTACHED)**

Provide the position, title in the applicant’s business, and address information for all current officers, directors, partners or trustees.

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<thead>
<tr>
<th>Name and Residential Address</th>
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IF MORE SPACE IS REQUIRED, PLEASE SUBMIT ADDITIONAL INFORMATION ON OTHER OFFICERS IN A SEPARATE DOCUMENT TITLED “CURRENT OFFICERS (CONTD.)” IN ACCORDANCE WITH THE ATTACHMENT FILE NAME FORMAT REQUIREMENTS AND INCLUDE IT WITH THE ATTACHMENTS.

SECTION 21 – OWNERSHIP  (SEE ATTACHED)

IN THIS SECTION, LIST ALL PERSONS WITH A CONTROLLING INTEREST IN THE BUSINESS, DEFINED AS FOLLOWS:

1. FOR A PUBLICLY TRADED COMPANY, VOTING RIGHTS THAT ENTITLE A PERSON TO ELECT OR APPOINT ONE OR MORE OF THE MEMBERS OF THE BOARD OF DIRECTORS OR OTHER GOVERNING BOARD, OR THE OWNERSHIP OR BENEFICIAL HOLDING OF 5% OR MORE OF THE SECURITIES OF THE PUBLICLY TRADED COMPANY.

2. FOR A PRIVATELY HELD ENTITY, THE OWNERSHIP OF ANY SECURITY IN THE ENTITY.

COMPLETE THE APPROPRIATE SECTION(S) BELOW:

A. FOR C-CORPORATIONS, S-CORPORATIONS, LLCS AND LLLCs

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|------------------------------------------|
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# Pennsylvania Department of Health
## Medical Marijuana Dispensary Permit Application

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# Medical Marijuana Dispensary Permit Application

**Address Line 1:**

**Address Line 2:**

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**City:**

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**Occupation:**

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Pennsylvania Department of Health  
Medical Marijuana Dispensary Permit Application

Address Line 3: | City: | State: | Zip Code: |
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Phone: | Fax: | Email: |

Stock type or class: | Number of shares held: | Date Acquired: | Percentage of outstanding voting stock: | Terms, conditions, rights and privileges: |
--- | --- | --- | --- | --- |

**IF MORE SPACE IS REQUIRED, PLEASE SUBMIT ADDITIONAL INFORMATION ON OTHER OWNERS OF THE CORPORATION IN A SEPARATE DOCUMENT TITLED “OWNERS OF THE CORPORATION (CONT'D)” IN ACCORDANCE WITH THE ATTACHMENT FILE NAME FORMAT REQUIREMENTS AND INCLUDE IT WITH THE ATTACHMENTS.**

**B. FOR PARTNERSHIPS AND LLPs**

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**Partner Type:**
- [ ] General/Full Partner
- [ ] Limited Partner
- [ ] Dormant/Silent Partner
- [ ] Other:

<table>
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<tr>
<th>Percentage of ownership:</th>
<th><strong>Partnership participation from:</strong> MM/DD/YYYY</th>
<th><strong>Description of participation in operation of the applicant:</strong></th>
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<td>Partner Type:</td>
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<td>Description of participation in operation of the applicant:</td>
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Name and Residential Address

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<th>First Name:</th>
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Pennsylvania Department of Health  
Medical Marijuana Dispensary Permit Application

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<td>Percentage of ownership:</td>
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</tbody>
</table>

☐ General/Full Partner  
☐ Limited Partner  
☐ Dormant/Silent Partner  
☐ Other:  

If more space is required, please submit additional information on other partners in a separate document titled “INTEREST OF OTHER PARTNERS (CONTD.)” in accordance with the attachment file name format requirements and include it with the attachments.

C. Other Persons Holding an Interest in the Proposed Site or Facility

List any other persons holding an interest in the proposed site or facility, that are otherwise not disclosed in Sections A or B.

<table>
<thead>
<tr>
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Nature, type, terms and conditions of the interest in the applicant:

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Pennsylvania Department of Health
Medical Marijuana Dispensary Permit Application

Address Line 1: ___ Address Line 2: ___
Address Line 3: ___ City: ___ State: ___ Zip Code: ___
Phone: ___ Fax: ___ Email: ___

Nature, type, terms and conditions of the interest in the applicant:

Name and Residential Address

First Name: ___ Middle Name: ___ Last Name: ___ Suffix: ___
Occupation: ___ Title in the applicant’s business: ___
Also known as: ___ Date of birth: MM/DD/YYYY
Address Line 1: ___ Address Line 2: ___
Address Line 3: ___ City: ___ State: ___ Zip Code: ___
Phone: ___ Fax: ___ Email: ___

Nature, type, terms and conditions of the interest in the applicant:

If more space is required, please submit additional information on other persons holding an interest in the proposed site or facility in a separate document titled “Other Persons Holding an Interest in the Proposed Site or Facility (Contd.)” in accordance with the attachment file name format requirements and include it with the attachments.

SECTION 22 – CAPITAL REQUIREMENTS

Provide a summary of your available capital and an estimated spending plan to be used for you to become operational within six months from the date of issuance of the permit.

Please see attached Capital Requirements narrative.

Part F – Community Impact
(Scoring Method: 100 Points)

SECTION 23 – COMMUNITY IMPACT

Please be advised, indication of support from public officials will NOT be considered when evaluating this section.

Provide a summary of how the applicant intends to have a positive impact on the community where its operations are proposed to be located.

Please see attached Community Impact narrative.
Attachment A: Signature Page

Instructions:
This attachment is the signature page for your application and all other attachments.
- Please review the application
- By checking the appropriate boxes, indicate the sections that are included in your submission
- Print this attachment
- Sign the document (primary contact or registered agent)
- Scan this sheet and save it as a file called “Attachment A,” using the appropriate file name format

By checking “Yes,” you acknowledge that you have read the Medical Marijuana Organization Permit Application Instructions before completing an application for a medical marijuana organization permit.

The applicant hereby submits this application for a Medical Marijuana Organization Permit to the Pennsylvania Department of Health, which consists of the completed application parts and attachments listed below:

FEES:
- ☒ Initial Application Fee
- ☒ Initial Permit Fee

APPLICATION:
- ☒ Completed Application

OTHER ATTACHMENTS:
- ☒ Attachment B: Organizational Documents
- ☒ Attachment C: Property Title, Lease, or Option to Acquire Property Location
- ☒ Attachment D: Site and Facility Plan
- ☒ Attachment E: Personal Identification
- ☒ Attachment F: Affidavit of Business History
- ☒ Attachment G: Affidavit of Criminal Offense
- ☒ Attachment H: Tax Clearance Certificates
- ☒ Attachment I: Affidavit of Capital Sufficiency
- ☒ Attachment J: Sample Medical Marijuana Product Label
- ☒ Attachment K: Release Authorization
- ☒ Attachment L: Applicant Priorities for Multiple Applications

BACKGROUND CHECKS:
- ☒ The applicant has requested background checks, as described in the instructions.
**ADDITIONAL ATTACHMENTS:**
Please list any other documents you are submitting as part of this application:

<table>
<thead>
<tr>
<th>File Name</th>
<th>Name of Document</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. BioTrackTHC LOI Support</td>
<td>Knox Medical_03202017Dispensary_Exhibit 1 Biotrack LOI Support Document.pdf</td>
<td>Utilized to supplement applicant response to Questions 11, 12, 14, 15, 16, 18, 19, 21, 22.</td>
</tr>
<tr>
<td>2. BioTrackTHC Training Manual</td>
<td>Knox Medical_03202017Dispensary_Exhibit 2 Biotrack Training Manual.pdf</td>
<td>Utilized to supplement applicant response to Questions 11, 12, 14, 15, 16, 18, 19, 21, 22.</td>
</tr>
<tr>
<td>5. Knox Employee Training &amp;</td>
<td>Knox Medical_03202017Dispensary_Exhibit 5 Knox Employee Training and Training</td>
<td>Utilized to supplement applicant descriptions of employee training procedures throughout multiple responses.</td>
</tr>
<tr>
<td>Training Schedule</td>
<td>Schedule.pdf</td>
<td></td>
</tr>
<tr>
<td>6. MCPU Rapid Deployment Plan</td>
<td>Knox Medical_03202017Dispensary_Exhibit 6 MCPU Rapid Deployment Plan.pdf</td>
<td>Utilized to supplement applicant’s plan of operations, growing and processing plans, and capital outlay response.</td>
</tr>
<tr>
<td>7. Physician Engagement Program</td>
<td>Knox Medical_03202017Dispensary_Exhibit 7 Physician Engagement Program.pdf</td>
<td>Utilized to supplement and add to the community outreach and established development as a business for applicant.</td>
</tr>
<tr>
<td>8. Omitted Intentionally</td>
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<td>9. Omitted Intentionally</td>
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<td>13. Omitted Intentionally</td>
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***CONTINUED ON FOLLOWING PAGE***
A false statement made in this application is punishable under the applicable provisions of 18 Pa. C.S. Ch. 49 (relating to falsification and intimidation).

Zachary R. Kobrin
Signature
Printed Name

Jose Javier Hidalgo
Chief Executive Officer
3/20/2017
Signature
Printed Name

Henry Batievsky
Chief Financial Officer
3/20/2017
Signature
Printed Name

A photocopy, facsimile or other electronic version of this document shall be accepted as an original signature.
Attachment B: Organizational Documents

Instructions:
- Attach certified copies of the applicant’s certificate of incorporation, partnership agreement, charter or other such documentation. If the applicant is not organized in Pennsylvania, attach certified copies of documentation that show that the applicant is authorized to do business in Pennsylvania.
- Complete this cover sheet. Scan this sheet and the organizational documents and save it as a PDF file called “Attachment B,” using the appropriate file name format.

Business Name, as it appears on the applicant’s certificate of incorporation, charter, bylaws, partnership agreement or other legal business formation documents:

Cansortium Pennsylvania, LLC
Trade names and DBA (doing business as) names: Knox Medical, LLC

Principal Business Address: 1150 First Ave., Suite 551
City: King of Prussia  State: PA  Zip Code: 19406

DOH REDACTED
TO ALL WHOM THESE PRESENTS SHALL COME, GREETING:

Cansortium Pennsylvania, LLC

I, Pedro A. Cortés, Secretary of the Commonwealth of Pennsylvania, do hereby certify that the foregoing and annexed is a true and correct copy of

Creation Filing filed on Feb 22, 2017 - Pages (2)

which appear of record in this department.

IN TESTIMONY WHEREOF, I have hereunto set my hand and caused the Seal of the Secretary’s Office to be affixed, the day and year above written

Secret of the Commonwealth

Certification Number: TSC170314170891-1

Verify this certificate online at http://www.corporations.pa.gov/orders/verify.aspx
Filing Team
Name
906 West 2nd Ave., STE 100,
Address
City, State Zip Code

Certificate of Organization Domestic Limited Liability Company
DSCB:15-8821(rev. 2/2017)
8821

Read all instructions prior to completing. This form may be submitted online at https://www.corporations.pa.gov/.

Fee: $125.00
☐ I qualify for a veteran/reservist-owned small business fee exemption (see instructions)

In compliance with the requirements of 15 Pa.C.S. § 8821 (relating to certificate of organization), the undersigned desiring to organize a limited liability company, hereby certifies that:

1. The name of the limited liability company (designator is required, i.e., “company”, “limited” or “limited liability company” or abbreviation):
   Cansortium Pennsylvania, LLC

2. Complete part (a) or (b) – not both:
   (a) The address of the limited liability company’s initial registered office in this Commonwealth is:
      (post office box alone is not acceptable)
      1150 First Ave. STE 551 King of Prussia PA 19406 Montgomery
      Number and Street City State Zip County
   
   (b) name of its commercial registered office provider and the county of venue is:
   c/o:
   Name of Commercial Registered Office Provider County

3. The name and address, including street and number, if any, of each organizer is (all organizers must sign on page 2):
   Name Address
   Morgan Noble 1150 First Ave. STE 551, King of Prussia, Montgomery, PA, United States, 19406

4. Effective date of Statement of Registration (check, and if appropriate complete, one of the following):
   ☑ The Certification of organization shall be effective upon filing in the Dept of State.
   ☐ The Certification of organization shall be effective on:
   Date(MM/DD/YYYY) Hour (if any)

PENN File: February 22, 2017
5. **Restricted professional companies only.**
   
   Check the box if the limited liability company is organized to render a restricted professional service and check the type of restricted professional service(s).
   
   - [ ] The company is a restricted professional company organized to render the following restricted professional service(s):
     - [ ] Chiropractic
     - [ ] Dentistry
     - [ ] Law
     - [ ] Medicine and surgery
     - [ ] Optometry
     - [ ] Osteopathic medicine and surgery
     - [ ] Podiatric medicine
     - [ ] Public accounting
     - [ ] Psychology
     - [ ] Veterinary medicine

6. **Benefit companies only.**
   
   Check the box immediately below if the limited liability company is organized as a benefit company:
   
   - [ ] This limited liability company shall have the purpose of creating general public benefit

   Optional specific public benefit purpose. Check the box immediately below if the benefit company is organized to have one or more specific public benefits and supply the specific public benefit(s). See instructions for examples of specific public benefit.
   
   - [ ] This limited liability company shall have the purpose of creating the enumerated specific public benefit(s):

   [Blank Line]

   [Blank Line]

7. For additional provisions of the certificate, if any, attach an 8½ x 11 sheet.

IN TESTIMONY WHEREOF, the organizer(s) has (have) signed this Certificate of Organization this 22 day of February, 2017.

__________________________
Morgan Noble
Signature
Attachment C: Property Title, Lease, or Option to Acquire Property Location

Instructions:
- Attach one of the following:
  - Evidence of the applicant’s clear legal title to or option to purchase the proposed site and facility
  - A fully-executed copy of the applicant’s unexpired lease for the proposed site and facility and a written statement from the property owner that the applicant may operate a medical marijuana organization on the proposed site for, at a minimum, the term of the initial permit
  - Other evidence that shows that the applicant has a location to operate its medical marijuana organization
- Complete this cover sheet. Scan this sheet and the appropriate document(s) and save it as a PDF file called “Attachment C,” using the appropriate file name format

Business Name, as it appears on the applicant’s certificate of incorporation, charter, bylaws, partnership agreement or other official documents:

Cansortium Pennsylvania, LLC

Trade names and DBA (doing business as) names: Knox Medical, LLC

Principal Business Address: 1150 First Ave., Suite 551
City: King of Prussia  |  State: PA  |  Zip Code: 19406

DOH REDACTED
To Whom It May Concern:

Matthew Barnes is the owner of record for the property located at 3857 Peach St, Erie, PA (the "Property"). Matthew Barnes has recently entered into an agreement whereby it will lease the Property to Consortium Pennsylvania, LLC d/b/a Knox Medical for use as a medical marijuana dispensary pursuant to applicable Pennsylvania law and approves of said use of the property. Furthermore, there are currently no encumbrances on the Property which would impair Knox Medical's ability to utilize the Property as a medical marijuana dispensary.

By: ____________________

Matt Barnes

Print Name: ____________________

Title: ____________________
Attachment F: Affidavit of Business History

Instructions:

- Each principal or operator of the applicant must complete the Affidavit of Business History.
- Execute the affidavit and save as a PDF file called “Attachment F,” using the appropriate file name format. A cover sheet is not needed.
Affidavit of Business History

State of Florida  
County of Broward

The undersigned, Jose Javier Hidalgo, hereby certifies the following:

During the 10 years preceding the filing date of the initial permit application, the following principal(s), operator(s), financial backer(s) and employee(s), have held a position of management or ownership of a controlling interest in any other business in this Commonwealth or any other jurisdiction involving the manufacturing or distribution of medical marijuana or a controlled substance:

<table>
<thead>
<tr>
<th>Name of individual</th>
<th>Role (principal, operator, financial backer or employee)</th>
<th>Business name and address</th>
<th>Position of management or ownership of a controlling interest</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jose Javier Hidalgo</td>
<td>Principal, Operator, Fin. Backer</td>
<td>Knox Servicing, LLC d/b/a Knox Medical; Cansortium Holdings, LLC, Cansortium Puerto Rico, LLC</td>
<td>Managing Member &amp; Owner of Medical Marijuana Dispensing Organization in Florida and Puerto Rico</td>
<td>2015-Present</td>
</tr>
<tr>
<td>Bruce Knox</td>
<td>Principal, Operator, Fin. Backer</td>
<td>Knox Servicing, LLC d/b/a Knox Medical</td>
<td>Managing Member &amp; Owner of Medical Marijuana Dispensing Organization in Florida</td>
<td>2015-Present</td>
</tr>
</tbody>
</table>

I hereby certify that I am authorized to execute this affidavit on behalf of the applicant and that the information contained herein is true and correct and that there is no misrepresentation, falsification or omissions in this affidavit. I am further aware that any false or misleading statement or omitted information is punishable under the applicable provisions of 18 Pa. C.S. § 49 (relating to falsification and intimidation).

[Signature]
[Date]

Sworn to and subscribed before me this 19th day of March, 2017

[Signature]

A photocopy, facsimile or other electronic version of this document shall be accepted as an original signature.

[Notary Public]

[Seal]

[Comission Expires: Sept. 13, 2020]
Attachment G: Affidavit of Criminal Offense

Instructions:
- Each principal or operator of the applicant must complete the Affidavit of Criminal Offense
- Execute the affidavit as instructed and save as a PDF file called “Attachment G,” using the appropriate file name format. A cover sheet is not needed
The undersigned, Jose Javier Hidalgo, hereby certifies the following by checking the boxes below:

**Principal(s):**

☒ No principal(s) listed in this permit application have been convicted of a criminal offense graded higher than a summary offense.

☐ One or more principals listed in this permit application have been convicted of a criminal offense graded higher than a summary offense.

If one or more principal(s) listed in this permit application has been convicted of a criminal offense graded higher than a summary offense, please provide below the name(s) of the principal(s) and the offense(s) of which one or more principal(s) was convicted.

Name(s): __________________________________________
Offense(s): _______________________________________

**Operator(s):**

☒ No operator(s) listed in this permit application have been convicted of a criminal offense graded higher than a summary offense.

☐ One or more operator(s) listed in this permit application has been convicted of a criminal offense graded higher than a summary offense.

If one or more operator(s) listed in this permit application has been convicted of a criminal offense graded higher than a summary offense, please provide below the name(s) of the operator(s) and the offense(s) of which one or more operator(s) was convicted.

Name(s): _________________________________________
Offense(s): _______________________________________

**Financial Backer(s):**

☒ No financial backer(s) listed in this permit application have been convicted of a criminal offense graded higher than a summary offense.
One or more financial backer(s) listed in this permit application have been convicted of a criminal offense graded higher than a summary offense.

If one or more financial backer(s) listed in this permit application have been convicted of a criminal offense graded higher than a summary offense, please provide below the name(s) of the financial backer(s) and the offense(s) of which one or more financial backer(s) was convicted.

Name(s): ____________________________
Offense(s): __________________________

[Signature of Affiant and Title]

[Date]

Sworn to and subscribed before me this 19th day of March, 2017.

[Notary Public]

MY COMMISSION EXPIRES: Sept. 13, 2020

A photocopy, facsimile or other electronic version of this document shall be accepted as an original signature.
ATTACHMENT I-2: AFFIDAVIT OF CAPITAL SUFFICIENCY FOR A DISPENSARY PERMIT APPLICANT

COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF HEALTH

AFFIDAVIT OF CAPITAL SUFFICIENCY

Commonwealth of Pennsylvania  }  
County of LAURENCE  } ss:

I, WE, ANTHONY C. SANTILLI

DOH REDACTED

For the following applicant:

Consortium Pennsylvania, LLC

NAME OF BUSINESS

ADDRESS

PHONE

CITY  STATE  ZIP CODE  COUNTY

hereby certify that the Applicant named has at least $150,000 on deposit with one or more financial institutions:
Attachment J: Sample Medical Marijuana Product Label

| Business Name, as it appears on the applicant’s certificate of incorporation, charter, bylaws, partnership agreement or other official documents: Cansortium Pennsylvania, LLC |
| Trade names and DBA (doing business as) names: Knox Medical, LLC |
| Principal Business Address: 1150 First Ave., Suite 551 |
| City: King of Prussia | State: PA | Zip Code: 19480 |

Instructions:
- Provide a sample label for each medical marijuana product you expect to produce
- Complete this cover sheet. Scan this sheet and the sample labels and save it as a PDF file called “Attachment J,” using the appropriate file name format

DOH REDACTED
Attachment K: Release Authorization

Instructions:
- Execute the following release authorization
- Scan the completed and executed release authorization below save it as a PDF file called "Attachment K," using the appropriate file name format. No cover sheet is needed
RELEASE AUTHORIZATION

TO: ____________________________________________________________

(Do not write above this line – For Department of Health Only)

FROM: Cansortium Pennsylvania, LLC, d/b/a Knox Medical, LLC

Applicant’s Name

I, Jose Javier Hidalgo, by and on behalf of the undersigned applicant, have filed a permit application with the Pennsylvania Department of Health (“Department”). I certify that I am authorized by the applicant to submit this Release Authorization on its behalf and to bind the applicant to all provisions within this Release Authorization. I understand that the applicant is seeking the granting of a privilege and acknowledge that the burden of proving the applicant's qualifications and suitability for a favorable determination is at all times the burden of the applicant.

I understand that a background investigation may be conducted by the Department pursuant to its statutory duty to investigate the character, honesty, integrity and suitability of myself and any entity with which I am associated. I further understand and agree that I am voluntarily executing this Release Authorization to expressly authorize and permit the Department to obtain any and all information it deems necessary, and accept any risk of adverse public notice, embarrassment, criticism, or other action or financial loss which may result from action with respect to this permit application.

The rights and powers herein are granted to facilitate the background investigation being conducted by the Department at my request and on behalf of the applicant and is not otherwise intended to create or establish a legal or fiduciary relationship between the Department, its agents and employees, and me. I hereby acknowledge that no such relationship exists.

1. I hereby authorize and request every person, firm, company, corporation, board, association or institution of any kind, and every Federal, state or local government entity, including but not limited to every court, law enforcement agency, criminal justice agency or probation department, without exception, both foreign and domestic, to whom this Release Authorization is presented having any knowledge, information, documents, forms, photographs, computer files, accounts, ledgers or other items about, relating to or concerning the applicant and to fully discuss with and answer any inquiry made by any duly authorized investigator of the Pennsylvania Department of Health.

2. If this Release Authorization is presented to any brokerage firm, bank, savings and loan, or other financial institution or officer of same, I hereby authorize and request any and all documents, records or correspondence pertaining to the applicant, including but not limited to past loan information, notes, checking account records, savings deposit records, safe deposit box records, passbook records and general ledger folio sheets.

3. I hereby authorize an agent of the Department to obtain and review copies of any and all documents, records or correspondence pertaining to myself and the applicant, and I hereby authorize any Federal, state or municipal agency or body, law enforcement agency or criminal justice agency or department, tax agency or authority, regulatory agency, authority or body, to make full and complete disclosure of any and all information and documents including, but not limited to, documents and information otherwise privileged or not subject to public disclosure, as well as other information on file or available concerning the applicant.

4. This Release Authorization extends to the review and copy of any information protected by law or contact from disclosure, privilege or obligation.

5. I do for the applicant, as well as for myself, my heirs, executors, administrators, successors and assigns, hereby release, remise, exonerate and forever discharge the Department, its members, agents and employees, the Commonwealth of Pennsylvania and its instrumentalities, and any agents and employees...
thereof, from any and all liabilities including but not limited to all manner of actions, causes of action, suits, debts, judgments, executions, claims, and demands whatsoever, known and unknown, in law or equity, which exist now or in the future against those entities and persons other than relating to a willfully unlawful disclosure or publication of material or information acquired during my investigation.

6. I do for the applicant, as well as for myself, my heirs, administrators, successors and assigns, hereby release, remise, exonerate and forever discharge every person, firm, company, corporation, board, association or institution of any kind, and every Federal, state or local government entity, including but not limited to every court, law enforcement agency, criminal justice agency or probation department, without exception, both foreign and domestic, to whom this request is presented, and any agents or employees thereof, from any and all liabilities, including but not limited to all manner of actions, causes of action, suits, debts, judgments, executions, claims and demands whatsoever, known or unknown, in law or equity, which exist now or in the future against those entities and persons to whom this request is presented, and any agents or employees thereof, arising out of or by reason of the furnishing or inspection of documents, records or other information released in compliance with a request made pursuant to, or as a result of, having been presented with, this Release Authorization.

7. The applicant agrees to indemnify and hold harmless the Department, its officials and employees and every person, firm, company, corporation, board, association or institution of any kind, and every Federal, state or local government agency, to whom this request is presented and form and against all claims, damages, losses, and expenses including reasonable attorneys' fees arising out of or by reason of, the acts permitted and provided for in the Release Authorization.

8. I agree that a reproduction of this request by photocopy, facsimile or other similar process shall be for all intents and purposes as valid as the original.

IN WITNESS WHEREOF, I have executed this Release on this 19th day of March, 2017.

[Signature]

Authorized Signatory

STATE OF Florida

COUNTY OF Broward

On this 19th day of March, 2017, before me, a Notary Public, personally appeared Jose J. Hidalgo (known to me or satisfactorily proven) to be the person whose name is subscribed in this Release, and acknowledged that he/she executed the same for the purposes herein contained.

[Signature]

Christina Fragoso

Notary Public

MY COMMISSION # G029520
EXPIRES September 13, 2020

MY COMMISSION EXPIRES:
Sept. 13, 2020
## Applicant Priorities for Multiple Applications

### Instructions:
- This attachment is for applicants who are submitting multiple medical marijuana organization permit applications. Use this attachment to indicate your priorities for which medical marijuana regions or counties you prefer for issuance of a permit. Not providing Attachment L as part of your medical marijuana organization permit application indicates that you have no preference.
- If you submit this form more than once, the last form the Department receives will represent your prioritization. This form cannot be submitted without being part of an application.
- If you elect to submit this attachment, please scan the completed form and save it as a PDF file called “Attachment L,” using the appropriate file name format.

### Business Name:
Business Name, as it appears on the applicant’s certificate of incorporation, charter, bylaws, partnership agreement or other official documents: Cansortium Pennsylvania, LLC

### Trade names and DBA (doing business as) names:
Trade names and DBA (doing business as) names: Knox Medical, LLC

### Principal Business Address:
City: King of Prussia  
State: PA  
Zip Code: 19406

### B. Priorities for Multiple Dispensary Permit Applications

Please check one of the following:
- [x] The applicant would like to make the Department aware of the applicant’s priorities as listed below
- [ ] The applicant has no preference regarding county

<table>
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<th>MEDICAL MARIJUANA REGION</th>
<th>For each region for which you plan to submit multiple applications, please indicate the counties in order of priority, with 1 being the highest</th>
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                             | Chester  
                             | Delaware  
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                             | Philadelphia |
| 2- Northeast             | Lackawanna  
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                             | Luzerne  
                             | Northampton |
| 3- Southcentral          | Blair  
                             | Cumberland  
                             | Dauphin  
                             | 5. York |
| 4- Northcentral          | Centre  
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Core Systems
Training Manual
Welcome to BioTrackTHC. This manual can help guide users to set up the BioTrackTHC system and answer any questions you might have about BioTrackTHC. This will cut down on time spent with our tech support reps and allow you to focus solely on running your business and using BioTrackTHC to its full capability! This document coupled with our WIKI page will guide you to the correct answers on anything you can think of!

Thanks for joining us!

Available Training Resources:

1. The BioTrackTHC™ Users Manual is the complete reference book for BiotrackTHC and can be found here: [http://server.biotrackthc.net/biotrackthc.pdf](http://server.biotrackthc.net/biotrackthc.pdf)

2. The Support Video Tutorial Library is an ever expanding online collection of video shorts organized by topic for quick reference and can be found here: [https://biotrackthc.com/helpdesk](https://biotrackthc.com/helpdesk)

3. The BioTrackTHC™ YouTube Channel is an ever expanding resource with videos that address FAQ’s of BioTrackTHC™ users and is available here: [https://www.youtube.com/channel/UCDL9lqCFuJypA0cKZQbbL0Q](https://www.youtube.com/channel/UCDL9lqCFuJypA0cKZQbbL0Q)

4. The BioTrackTHC Wiki is the premier comprehensive online reference work. See your On Boarding Agent if you need assistance with access. The Open State BioTrackTHC Wiki is available here: [https://sites.google.com/a/biotrackthc.com/biotrackthc_manual](https://sites.google.com/a/biotrackthc.com/biotrackthc_manual)

Tech Support is always available by emailing support@BioTrackTHC.com or calling 1-844-420-TECH
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Chapter 1: Users, Permissions & Settings

1) User Setup and Permissions
This is where the user can add, change and make user profiles inactive (No longer works there). This is where the user can set and change the passwords and pin numbers. The user can add users to multiple locations and change permissions. Making someone an administrator will allow them to make any changes in BiotrackTHC and authorize lower level employee’s actions.

A) User setup
   1) Add a new user in BiotrackTHC.
      a) Admin>Users>Add New User
   2) Modify a user in BiotrackTHC.
      a) Admin>Users>Modify User

B) Permission Overview
This is where administrators can revoke access to parts of BiotrackTHC they do not want lower level employees to access by unchecking the boxes. Some permissions have limits so the user can limit the daily amount. Keep in mind if the user has someone set for multiple locations the permissions are location specific. Shortcuts are preset permissions in BiotrackTHC for various roles in BioTrackTHC.

1) Permissions not give to lower level employees.
   a) Time Manager
   b) Inventory Adjustment
   c) Modify Products
   d) Modify Discount programs
   e) On the Fly Discount
      1) Limit the user’s employees on how many dollars that employee can discount per day.

2) System Authorization
   A) System Authorization settings
      Admin>Users>User Authorization
      Here the user can customize how BiotrackTHC authorizes various actions within BioTrackTHC. The available options are Fingerprint, PIN and None. The user may also choose whether or not this applies system wide, or on a per-terminal basis.
3) Settings
   A) Location Settings
      Administration>Location
      Location settings are the settings for one or multiple locations and may only be used by administrators in BioTrackTHC.
      1) Colors
         Administration>Location>Colors
         Here the user can change the colors of BioTrackTHC, they’re able to change a wide variety of colors in BioTrackTHC such as changing the background, tool bar and even font colors from here.
      2) Data Sharing
         Administration>Location>Data Sharing
         Data Sharing will allow the locations to share certain data like Strains, Products, Pricing, Discounts, Etc. to avoid data input at each location in BioTrackTHC and also to keep the information entered into BioTrackTHC consistent between locations.
      3) Edit Location
         Administration>Location>Edit Location
         This is where the user can enter in all the location information for each location they have. The information entered here is the information that will show on Invoices, Purchase Orders and Receipts.
         a) When making the location there is a type drop down box this will delegate what type of facility they’re making or editing. If they choose Combination this location will show the Growhouse, Inventory and Customer Tabs. Dispensary will not show the Growhouse tab and Cultivation will not show the Customer tab.

   B) Terminal Settings
      This is where the user can change the terminal information from name to the amount of cash that terminal starts with each day.
      1) Location is the location this terminal is located, also the location it will pull up each time they use it.
      2) Balance is the opening balance of the register.
      3) Authorization is the authorization method for this terminal (if authorization is terminal specific.)
      4) Default inventory is the inventory room this terminal will use by default when signing in. (Useful if the user’s lower level employees do not have access to the inventory so they can only pull out of that room.)
Growhouse

Chapter 2

1) Setup
   
   A) Digital Grow Grid

   *Options > Growhouse > Digital Grow Grid*

   This can be used to make the “ABC, 123” Grid larger to fit more plants and to make the room larger to fit the user’s needs, by default its 12x12. They may also select if they would like the colors to change by phase or by strain and here is where they can activate “Auto-Age Plants”

   B) Rooms, Tables and Locations

   *Growhouse > Rooms*

   Within the Growhouse tab the user can create the rooms digitally by creating rooms, plant tables and setting up plant locations in BioTrackTHC. By doing this the user can set up the Growhouse tab to be like the map or blueprint of their facility using the digital grow grid so they will know where each plant resides.

   **Rooms**

   1) When creating rooms in BioTrackTHC the user can name the rooms whatever the user would like and they can choose a phase for the room, the benefit being that when the user moves a plant from one room to another BioTrackTHC will automatically change the phase of the plant for the user. Also users have the ability to print barcodes for the room, so if they would like to move a plant between rooms they can scan the barcode of the plant and the room its going into an BioTrackTHC will move that plant

   2) Room Colors

   *Options > Growhouse > Room Colors*

   i. Growers can set the color for each room in BioTrackTHC to make it easier to see what room they would like to navigate too without seeing the name for that room.

   3) Plant Tables

   *Growhouse > Plant Tables*

   Gives the user the ability to stack as many plants onto one location as they would like, Plant Tables do not have an icon but if the user hovers over a plant table it will tell the user that it is a plant table and show all the plants on that table. When making a plant table the user will need to name it and
set the location for the table as well. Plant tables can have barcodes. To move plants from table to table the user can scan the plant and scan the table it’s going to and BioTrackTHC will move that plant for them.

4) Locations
Growhouse>Rooms>Print Labels
For each location in the room the user can create a barcode for that location, ex. Position A:1 on the digital grow grid. To do this the user will click print label from the room creator tool and click print label, then they can select what label the user would like, when selecting row and column that will be that one location in the grow.

C) Patient Plant Assignment (MEDICAL)
Administration>Growhouse>Compliance
BioTrackTHC can automatically assign patients to plants using Force Plant Destination, Also they can set up Assign Pending Patients to Plants to automatically assign available plants to any patients that have not been assigned plant and the grower can set up Require Valid Expiration Date for Assignment meaning the customer has to have a valid license number to be assigned a plant, if any patients license expires if assign pending patients to plants is on then BioTrackTHC will automatically reassign those plants.

D) New Plant Destination (MEDICAL)
Options>Growhouse>New Plant Destinations
New plant destinations is for medical cultivation facilities, it will allow the growers to see how many plants they have and how many they are allowed to grow based on the patient files at the dispensary. This will ensure growers are growing the proper number of plants for each location they grow for. When plants are assigned to a destination the plant count is applied to that location but the user can always change the destination of the plant from the modify plant screen.

E) Phase Change Setup
There are 3 ways to change phases of plants in BioTrackTHC. It is very important to track when plants change phase because there are a few reports that benefit from that information, the Yield Forecast Report that will learn from the users growing habits like when the plants change phase and how much they yield at harvest to project how much the grower should yield in future harvests.
1) Rooms  If the user has their rooms set up for each phase then when the user moves a plant from room to room BioTrackTHC will automatically change the phase of the plant for them.

2) Manually - Growers can change the phase manually by accessing the Modify Plant (Chapter 2.2.D) window or by clicking the Phases button in the list view mode.

3) Auto-Age Plants
   Options>Growhouse>Digital Grow Grid
   Is a way to set up BioTrackTHC to automatically change the phases of the plants. Auto age must be turned on by going to the Digital Grow Grid Screen
   Options>Growhouse>Plant Growth Phases
   After doing so the user will need to set the time it takes to reach each phase of the plant life, the user can set this as strain specific or the user can do all strains all at once. This is usually beneficial for outdoor grow or grows that have all the plants in one large room.

4) Plant Growth Colors
   Options>Growhouse>Plant Growth Colors
   Growers can set the colors to the phases of the plants life to make it easier in grid view mode, Keep in mind they can either have colors for phases or colors for strains not both. When setting this up users will select a color for each phase to be represented in grid view, also if the user sets the phases on the Room the icon of the room will be that the color of the phase its set to.

5) Plant Drying Phases
   Options>Growhouse>Plant Drying Phases
   Growers can use plant drying phases to track how dry the flower is. This can be used with the Auto-Age feature or the drying phase can be changed manually from the modify plant screen after the plant has been through the harvesting. This can be set for all strains or the user can set it by a strain to strain basis.

6) Plant Drying Colors
   Options>Growhouse>Plant Drying Colors
   Here growers can change the color of the plant as it advances through the drying process.
F) Batch Options

*Options>*Growhouse>*Batch Options*

Using the Batch Options will allow the grower to set up the harvest and cure process for the cultivation facility. From the Batch Option Screen the grower will delegate what weights they want to record and they can change the order in which things are to be weighed by selecting a line item and using the arrows on the right to move it up or down in the queue. Keep in mind the cultivation facility does a dry trimming the grower will weigh the whole plant during harvest then break up the weights upon cure and if they do a wet trimming the growers will enter the wet and dry weight for the bud, in either case each of the bi-products will be processed as soon as they enter the weight into BioTrackTHC whether it’s wet or dry. Any weight entered into BioTrackTHC will be reflected on the *Yield Report* and the percentage of moisture loss will be calculated on that report by taking the wet weight and dividing it by the dry bud weight to give the growers an idea of how much moisture each plant loses. Each bi-product has three options for processing the weight.

1) Batch Later

Batch later will allow the grower to weigh the weight and save it in the background of BioTrackTHC until he is ready to collect it, upon collecting the weight by using the *Create Batch* Button the grower can collect and re weigh the weight for one or multiple harvests. The grower can also decide if they would like to discard it as waste or put it into the inventory.

2) Batch at Harvest/Cure

Batch at Harvest/Cure will automatically send the weight into the inventory upon entering the weight from the harvest or cure screen whether it’s wet or dry, therefore if it’s wet the user might have to adjust the product in the inventory to account for moisture loss.

3) Discard as Waste

Will automatically remove the bi-product from BioTrackTHC and record it on the *Waste Report*.

4) Additional Collection Points

Collection points at the bottom of the *Batch Options* screen allows for multiple harvests of any one or multiple plants. This can be set for harvest and/or cure so the user can enter in more than one harvest information for each plant and/or batch. Allow out of order processing will allow the user to enter in both wet and dry weights before entering in the second set of dry weights, upon harvesting the plant for the second time BioTrackTHC will ask if they’re entering in a dry weight, if yes they’ll enter in the dry weight at the cure screen, if no it will bring the user to the harvest screen to enter in the second wet weight.

G) Additives

*Growhouse>*Additives

Nutrients and pesticides can be tracked in BioTrackTHC and automatically show on inventory and/or customer labels. Additives can be added to plants by scanning the barcode of the plant and scanning the barcode that can be generated for the additive when creating the additive.
H) Strains
Strains are required in BioTrackTHC to create any plant and are essential for growers to track the genealogy of the plants. Growers can keep track of the strain type like indica or sativa. A picture can be added and there is an area for quality rank. This is so the growers can rank the flower on a numerical scale and view ranking from the Strain Quality and Rank Report. Lastly growers can add strain notes to the right to help keep the growers on the same page about that strain. More than one note can be added and viewed by anyone.

1) Strain Type
Growhouse>Strain Types
By default BioTrackTHC has 5 strain types; Indica, Sativa, Indica x Sativa, Sativa x Indica and Indica/Sativa 50/50. Users have the option to create custom strain types as well to cater to whatever need the user has.

I) Plant Groups
Growhouse>Plant Groups
Plant Groups can be useful to track specific plant as a group, ie. all the plants under one light, if all those plants came from the same mother plant, Started veg at the same time, etc. Growers can customize, create and even modify existing plant groups using this tool. Barcodes can be scanned to modify the groups.

J) Containers
Growhouse>Containers
The containers feature can be used as a tear weight in BioTrackTHC. Each container can be weighed so when preforming an action with a scale in BioTrackTHC the grower can select the container that product is in so they can set the whole container on the scale and BioTrackTHC will automatically negate the weight of the container just giving the user the weight of the product inside. Keep in mind each container can weigh different even if the user bought the same containers on the same day from the same manufacturer, so label each container and maybe assign them a name or number so the user can always know what each different container is.
K) Barcodes

Options>Misc>Barcodes

Plant barcodes can be slightly modified in a few ways, keep in mind there is a way to make the barcode smaller but it will become unreadable if the user does. When adjusting barcodes in BioTrackTHC it is important to remember that there is a grid for the labels with an X and Y axis, X being horizontal (Left and Right), Y being vertical (Up and Down). Whenever the user adjusts the X and Y offsets the user is adjusting the objects position on this invisible grid. Sometimes moving the objects into negative fields may be required to account for the users label maker needs. Padding is the amount of space the barcode the actual image of the barcode needs to be pushed to the right to line up with the numbers at the bottom. Border will place a border around just the image of the user’s barcode. Pixels is how many pixels are in the barcode itself the more pixels the larger the barcode. Font size and text wrap only apply to the text on the label and not the numbers under the barcode. Text wrap is how many characters it will take before wrapping that line of text to the next line.

1) Quantity Prompt
   This will prompt the user for a Quantity each time they print a barcode.

L) Barcode Reuse

Options>Growhouse>Barcode Reuse

This allows for a single plant that is dried by itself (not batched with other plants) to retain its barcode when converted to inventory instead of receiving a new inventory barcode.

2) Growhouse Functionality

A) Stat Tab

The Stat Tab will give the grower a breakdown of all the plants they have in the cultivation facility and show how many plants are in each phase of growing and drying percentage. The strain tab will show how many of each strain they have then it will show a breakdown of how many strains are in each room. Lastly rate will show how long plants have been in a particular room for each strain.

B) View Mode

Growhouse>View Mode

There are two different view modes in the Growhouse. Grid view mode will show a map or a blueprint for the room to visually see where each plant is in each room. The list view mode will show all the information about each plant as a list and will allow the user to select multiple plants at once for various actions.
C) New Plant
The New Plant button can be found in the Growhouse screen and is used to enter new plants into BioTrackTHC. Upon clicking on new plant BioTrackTHC will have the user select the source (what’s is being entered a clone or seed) the quantity and growers can even put plants into plant groups, they can select preexisting groups, type in any group name they would like or they can select create group that will make the group name with the strain and the birthdate. The grower can select what room the plants are going into and input a destination the plants are being grown for.

1) Mother ID
The Mother ID button will help growers track the genealogy for the plants being grown in BioTrackTHC. By scanning the barcode of the mother plant here growers can use the Mother Yields Report to see the minimum, maximum and average harvested weight and the amount of clones spawned from a mother plant.

D) Modify Plant Screen
The Modify Plant screen will store all of the information about any plant of the users choice; the user can navigate to this screen by double clicking on the plant or by scanning or looking up the barcode. Growers can change most of the information about this plant from this screen, such as strain, room, phase, plant group, table by selecting a new option in the drop down menus. The grower may also designate this plant as a mother plant.

1) Notes, Strain Notes & Additives
   a) Notes
      Notes can be added to one plant or to an entire group of plants. These notes can be viewed at any time, the note will always show the user that applied the note and the date it was added. The New and Save Button apply to the notes being added, be sure to save the notes.

   b) Strain Notes
      This will show all the strain notes added to that particular strain. Growers can add and modify strain notes from here to make it easier to update information about that strain.
c) Additives
Additive can be applied from the modify plant screen and growers can view here what has been added, when it was added, and what type it was either nutrient or pesticide.

2) Buttons on this window
a) Harvest/Cure
These buttons will allow the grower to begin harvesting or curing for an individual plant from the modify plant screen. These buttons will change depending on the phase of that plant's life cycle.

b) Transfer
Transfer will move this plant into the inventory as a clone to transfer to another location or for sale either on the wholesale or retail level.

c) Print
The print button will print the barcode of the plant.

d) Remove
This will begin removing the plant from BioTrackTHC, have the user put in a reason for removing the plant and will place the plant on the Removed Plants Report. That report will show who removed the plant the day it was removed and the reason why it was removed.

e) Reminders
Growers can set reminders on individual plants and those plants will flash red in grid view mode and say alert in the reminders tab on list view mode when the date and time is reached in BioTrackTHC. This is a useful tool usually paired with notes to know why the reminder is going off.

f) Patient (MEDICAL)
Patient will show what patient this plant is assigned too, if there is no patient assigned users can assign one from here by clicking the patient button and the assign patient window will appear where the user can search for a patient to assign this plant too.

g) Destination
Destination is the location the user are growing this plant for, when assigning this destination the plant count is pulled from this location. This location can be changed by clicking on the destination button and choosing a new location. Plant inventory Report will show what plants are assigned to each location to see on a larger scale.
E) Moving plants

There are a few different ways to move plants in BioTrackTHC, whether it’s from room to room or if the users are just moving its location in the room.

1) Barcode

   Barcodes can be used to change the room, plant table or even the location within the room, after printing the barcodes needed, *Growhouse > Rooms > Print Barcode*, the user can scan the barcode of the plant and scan the room, table or location and BioTrackTHC will automatically move the plant.

2) Modify Plant Screen

   Plants can move locations from the modify plant screen by typing in a new location on the digital grow grid in the location window, or by selecting a new room or table from the drop down boxes.

3) Move Button (List View Mode)

   In list view mode there is a few methods to moving plants the first being the user selects all the plants they would like to move by checking off the boxes next to the plants they want to move then click the Move button and BioTrackTHC will automatically populate those plants in the move window or a user can click on the move button and scan the barcodes of plants to add them to the move window. There is also the option New Grid Location if checked BioTrackTHC will put the plant in the first available position in the room, if unchecked the plant will stay in the same location as the previous room.

F) Changing Phases of Plants

Keeping track of the phase of each plants life is not only beneficial to see information on the *Stat Tab* like how many flowering plants the user have and store the information on each plant but also in BioTrackTHC because BioTrackTHC will take that information as well as the yield information to generate the *Yield Forensics Report* that will generate a predicted future harvest weight, this being more accurate when each plant is harvested separately. There are a few ways to change the phase of the plants.

1) By Room

   The plants can change phase automatically when they are moved into a room if that room was assigned a specific phase upon creation. The plant can be moved with the move button so multiple plants can be moved or individual plants can be moved from the *Modify Plant Screen*.

2) Manually

   To manually change the phase the user can change an individual plant from the *Modify Plant Screen* in the phase box. The user can also move multiple plants at once using the Phases button, this feature allows for two ways of changing multiple plants at once. The first way is the user can
select the plants in List View Mode and click on the Phases button or they can click the Phases button and scan the barcodes of the plants they would like to change. In addition if there are plants that will not need to change the barcode can be unchecked the user can select all or select none as well. The user will select the new phase and click ok to proceed with the phase change.

3) Auto-Age
If Auto-Age (Chapter 2.1.E.1.) is turned on the BioTrackTHC will automatically change the phase of the plants when they reach a certain time in each phase.

G) Applying Additives
1) Barcode
A barcode can be made for each additive so when a user would like to apply an additive they can scan the barcode of the plant and scan the barcode of the additive and BioTrackTHC will apply that additive automatically in BioTrackTHC. This is useful for growers with wireless scanners or scanners attached to a tablet or laptop on a cart.

2) Manually
The additives can also be manually applied to an individual plant from the Modify Plant window by clicking on the additives tab and selecting the additives to apply. They may apply and delete an applied additive if they made a mistake. Users can apply additives to multiple plants by using the Additive button. They can check off each plant they want to apply the additive too in List View Mode and click the Additive button or click the Additives button then scan the barcodes of the plants the additives was applied too.

H) Adding Notes
Growers can add notes to plants to keep on track with the plants health and care. They can be added for a wide variety of reasons like “Watered the plant” or “Check for Spider Mites” and they can be paired with the Reminder Feature to remind the growers to “Check for Spider Mites” on a specific time and date. The notes can be viewed on each plant on the Modify Plant window. The notes can only be added manually and can be added to one plant or a plant group from the Modify Plant window or to multiple plants at once using the Notes button in List View Mode. They can either select all the plants they would like to add the notes too by checking them off in List View Mode then clicking the Notes button or by clicking the Notes button and scanning all the barcodes of the plants the user would like to add the note to.
I) Removing Plants
Removing plants in BioTrackTHC can be done to one or multiple plants a few different ways. Anytime a plant is removed from BioTrackTHC they are placed in the Removed Plant Report that will show when the plant was removed, who removed it and the reason why it was removed.

1) Individual Plant
   A single plant can be removed from the Modify Plant window by clicking on the Remove button, upon doing so the user must put in a reason for removal.

2) Multiple Plants
   Multiple plants can be removed two different ways, the Remove button in List View Mode or by using the Plant Audit Feature.
   a) Remove button
      When a grower needs to remove more than one plant from the cultivation facility they can use the remove plant. They can select all the plants in List View Mode by checking them off and clicking the Remove button, when doing so BioTrackTHC will ask the grower for a reason why the plants are being removed.
   b) Plant Audit
      Users can also remove plants using the Plant Audit feature, anytime a plant is removed using the Plant Audit feature the reason will always be that it was removed during a plant audit. *(Chapter 2.2.1)*

J) Assigning Patients to Plants (MEDICAL)
Patients can be assigned to plants in BioTrackTHC automatically like instructed in Chapter 2.1.1C or they can be manually assigned upon creation of the plant from the Modify Plant window.

1) Reassign button
   The reassign button can reassign specific plants to available patients at a location of the user’s choice. The user will select the plants they would like to reassign and click the Reassign button upon doing so they will select a location to assign the available patients from and BioTrackTHC will reassign those plants automatically.

2) Patient Plant Lookup
   **Growhouse>Patient Plant Lookup**
   Users can look up patients in BioTrackTHC to see what plants are assigned to a specific patient and the plants can be reassigned to the next available patient by clicking on the plants desired to reassign then clicking the Reassign button.
K) Transferring Plants

1) Inventory

Plants can be sent to the inventory to be sold as a clone on the retail or wholesale level two different ways. First users can select one or multiple plants from the List View Mode and click on the Xfer Clone Button, which will move all the clones from the Growhouse into the inventory so they can be sold or transferred from there. In addition an individual plant can be moved to the inventory from the Modify Plant window by clicking on the Transfer Button, this button can be used to move that clone into the inventory or can be transferred to another cultivation location.

2) Location Transfer

Plants can be transferred to another cultivation facility if the location exists in the users database, if so individual plants can be transferred from the Modify Plant window then clicking the Transfer button, upon doing so the user will have the option to send it to the inventory or to send it to another cultivation facility, when selecting Growhouse to Growhouse Transfer the user will be brought to the Plant Location Move window. Multiple plants can be brought into this window by being in List View Mode and selecting all the plants desired and clicking on the Location Xfer button. From this window users can scan barcodes of plants to add them to the list. They can choose the Location and the room in the location they are sending it too.

L) Plant Audit

The Plant Audit feature is a great way to check plant counts and make sure plants got moved during a large scale move, furthermore plants can be removed using the Plant Audit feature. When clicking on the Plant Audit button the user can select what he would like to audit either all rooms, specific room or specific table.

When entering the Plant Audit window the user can scan the barcodes of the plants or check them off as they are counted any plants that are not check will take the action at the bottom either Remove the remaining plants or move remaining plants to a different room. When a plant is removed using the Plant Audit feature it is noted that the plant was removed during the plant audit for the reason.
M) Harvest & Cure

1) Harvest

Harvest and cure will allow the user to input wet and dry data for one or multiple plants during the harvesting and curing process. An individual plant can start the harvesting process from the Modify Plant window and clicking on the Harvest or Cure button (Which ever appears). For multiple plants the user can select the plants in List View Mode then click the Harvest/Cure button. Either method will open either the Harvest Plant Window or Cure Plant window. From the Harvest Plant or Cure Plant screen users can enter designated weights that are set from the Batch Options (Chapter 2.1.F). After the weights are entered, by using the connected scale or by manually inputting the weight, click next to move to the next field. The wording in bold is the weight the user is currently entering. The container feature can be used as the “tear” weights for the containers being used. The user may also change the defaulted actions for the bi-products by checking an option of their choice, Batch Later will save the weight in BioTrackTHC to be reweighed and created into a batch with the Create Batch button, Batch Now will place that weight into the inventory as a new product and Discard will place that weight on the Waste Report. After the weights have been entered the user can check additional collections if set up (Chapter 2.1.F.4). The user can move these plants into another room or table and even assign it into a new group with the dropdown boxes. Upon clicking Finished the weights will be recorded and the plant will be set to the Drying phase.

a) Drying Phases

When the plant is in the Drying phase a percentage of dryness can be set to represent how dry the plant actually is. This can be done manually in the Modify Plant window, phases will now show a percentage value. Alternatively users can set up Auto-Aging (Chapter 2.1.f.3) and BioTrackTHC will automatically change the percentage by the dates set by the user.

2) Cure

The Cure process is very similar to the harvest process but there are a few things to know. Multiple plants that were harvested individually can be added to cure as a group by selecting those plants in List View Mode and clicking the Harvest/Cure button but if the user harvested a group of plants together
BioTrackTHC will make those plants cure together, the reason being the Yield Report, this report will show all the weights collected and the percentage of moisture loss based on the wet and dry weights. Again the user will input the desired weights for the curing process. The user can utilize the additional collection points to leave the plant in the Growhouse but send the flower weight to the Inventory and can even assign an Inventory Grade (Chapter 3.1.H.3). Upon clicking Finish BioTrackTHC will print the inventory barcodes for the products being sent there. If additional collections are not being used then the plant will be removed from the Growhouse Tab.

N) Create Batch
The Create Batch button had two main purposes, to record waste weight created outside of the harvest/cure process and to reconcile weights from one or multiple harvest weights that were set up as batch later in the Batch Options (Chapter 2.1.F.1). When pulling a weight from outside a harvest the user can select not weighed yet if the user is reconciling weight from a harvest the user will select already weighed. The user then can select a strain but is not required if they would like to include all strain types, the room is where the products are or where the weight was recorded during harvest or cure and discard is asking if the user would like to discard this product (if yes it will be placed on the Waste Report). There is a date range to collect weight from multiple harvests of bi-product. When clicking process BioTrackTHC will open a new window, will show weights if Batched Later from harvest/cure, and BioTrackTHC will have the user weighs or reweighs (to account for moisture loss) the product before placing into the inventory or putting the information on the Waste Report.

O) Undo Features
Various actions in the Growhouse can be undone if a user makes a mistake. Keep in mind the user cannot undo a Cure or Convert Clone if the product was sold or modified. Users can undo a Cure and then undo the Harvest.
1) Convert Clone
Growhouse>Undo>Convert Clone
This will allow the user to undo a Transfer Clone to inventory (Chapter 2.2.K.1) action done in BioTrackTHC. The user will need to select the one or multiple clones from the inventory screen then go to the undo option Growhouse>Undo>Convert Clone. Upon doing so the user will have to confirm the action before the plant is placed back into its original position in the Growhouse.
2) Undo Harvest

*Growhouse>*Undo>*Harvest Plant*

When Undoing a Harvest the user must choose the date of Harvest and the Strain Harvested. After doing so the *Reverse Harvest Process* window will open and show for each plant the date of cure, Strain, Room it was harvested from, Barcode ID, Weight at Harvest and whether or not its revisable (can be undone). After selecting one or all the plants and clicking ok the Harvest will be undone and the plants will revert to the previous phase and location.

3) Undo Cure

*Growhouse>*Undo>*Cure Plant*

When Undoing a Cure the user must choose the date of Cure and the Strain harvested. After doing so the *Reverse Cure Process* window will open and show for each plant the date of cure, Strain, Room it was Cured from, Barcode ID, Weight at Cure and whether or not its revisable (can be undone), if a product has been modified or sold the Cure can’t be undone. After selecting one or all the plants and clicking ok the product in the inventory will be removed and the plants will be placed back into the inventory.

4) Remove Plant

*Growhouse>*Undo>*Remove Plant*

This function will allow users to undo plant destruction up to 14 days after it was removed. The *Reverse Removal Process* window will display all plants removed over the last 14 days and the user can check off the plants he would like to undo. After clicking ok the plant will be placed back into the room it was removed from.
3) Growhouse Reports

A) Mother Yields
This report provides data generated from clones that are taken from mother plants in the New Plant window with the Mother ID (Chapter 2.C.2), it can be sorted to show a specific Location or Strain. This report shows each mother plant's minimum, maximum, and average yields based on the clones that were spawned from that mother plant. Also, the plant count is how many clones have been made from that mother plant.

<table>
<thead>
<tr>
<th>Location</th>
<th>Strain</th>
<th>Id</th>
<th>Mean</th>
<th>Median</th>
<th>Min</th>
<th>Max</th>
<th>Range</th>
<th>Plant count</th>
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<tbody>
<tr>
<td>&quot;Grow&quot;House</td>
<td>Northern Lights</td>
<td>9099 4541 7691 5763 900</td>
<td>920.00</td>
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<td>500</td>
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<td>&quot;Grow&quot;House</td>
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<td>3659 6053 0301 8831 595.252016348774</td>
<td>500.00</td>
<td>100.00</td>
<td>1133.33</td>
<td>1033</td>
<td>367</td>
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<td>White Widow</td>
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<td>940.00</td>
<td>350.00</td>
<td>940.00</td>
<td>590</td>
<td>20</td>
<td></td>
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</tbody>
</table>

B) Plant Inventory
This report provides information about all plants in the grow and can be sorted in a few ways; Location, Stage (Growing, Drying, Mother), Strain, Room, Patient. The plant is assigned too, Destination the plant is being grown for and can even be sorted to see all the plants that came from a certain mother plant. The report itself shows; Location, Strain, ID, Phase, Room, Days in room, Birthdate, Total Days, Patient, Destination, Plant count (if it was a mother how many clones made from this mother), Grid location, Mother plant it came from, and Secondary ID is the MITS ID number.

<table>
<thead>
<tr>
<th>Strain</th>
<th>Id</th>
<th>Phase</th>
<th>Room</th>
<th>Days in room</th>
<th>Birthdate</th>
<th>Total days</th>
<th>Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Dream</td>
<td>7134</td>
<td>6850</td>
<td>9490 3500</td>
<td>Mother</td>
<td>834</td>
<td>835 days</td>
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<tr>
<td>Blueberry</td>
<td>5121</td>
<td>3495</td>
<td>1788 7385</td>
<td>Mother</td>
<td>834</td>
<td>835 days</td>
<td>M18126374</td>
</tr>
<tr>
<td>Bubble Gum</td>
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<td>5268</td>
<td>6936 1078</td>
<td>Mother</td>
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<td>778 days</td>
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<tr>
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<td>1405</td>
<td>0006 2196</td>
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<td>778 days</td>
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<tr>
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<td>0936</td>
<td>1151 8871</td>
<td>Mother</td>
<td>777</td>
<td>778 days</td>
<td>M18126374</td>
</tr>
</tbody>
</table>

C) Plant Summary
This report will show similar data to the plant inventory report, but is searchable by Birthday Start and Birthday End, Location and Strain, It will show; Location, Strain, ID, Birthdate, Days in Grow, Source (when it was created Seed or Clone), Mother plant it spawned from, Result (Last action recorded for the plant; Currently Growing, Converted to inventory, Removed, etc.), Result Date, Result data and Custom batch.

<table>
<thead>
<tr>
<th>Strain</th>
<th>Id</th>
<th>Birthdate</th>
<th>Days in grow</th>
<th>Source</th>
<th>Mother</th>
<th>Result</th>
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<td>141</td>
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</tr>
<tr>
<td>Acapulco Gold</td>
<td>6373</td>
<td>04/23/2014 15:49 PM</td>
<td>141</td>
<td>Clone</td>
<td>3659 6053 0301 8631</td>
<td>Converted to Inventory</td>
</tr>
</tbody>
</table>
D) Removed Plants
Removed plants will show any plants that were removed from BioTrackTHC (Chapter 2.2.1), whom removed it, the reason why and the date it was removed. This report can be sorted by start and end dates, Strain and Location.

E) Strain Counts
Strain counts does exactly what it sounds like, it will give the user a count of plants for each strain, this report can be sorted by location and strain to see what's at each location.

F) Strain Rank and Forecast
Strain Rank and forecast report will generate a rank for time in grow and average yield along with any rank the user assigned to the strain (Chapter 2.1.H) and will populate an overall rank based on all of the information. This report will also forecast the strains yields over a 90 day period. This report will run by date range and can be sorted by location or Grams, Ounces and Pounds.

G) Waste

---

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This report will show any waste created from the Create Batch (Chapter 2.2.N) Feature or from the Harvest and Cure (Chapter 2.2.M) Process. A date range is required for this report and it can be sorted by location. When displayed the report will show location and room where the waste was collected, Inventory Type (Stems, Trim, etc.), the user that removed it, the time it was removed and the amount of weight removed.

in the drying process. The report can be sorted a few different ways; Date type (Harvest, Cure, Birth dates), Date range is required, Location, Strain, Flower Room, Destination. Grouping will group all of the information for one strain into one line. When ran, the Yields report will show for each plant the barcode, Birth Harvest and Cure Dates, Strain, Wet Weight, Bud weight, Total percentage of loss for that plant, the average percentage of loss for the strain, Group it was apart of, any bi-product weight recorded (Stems, Trim, etc.), the destination (MEDICAL) set on the plant (Chapter 2.2.D.2.G), inventory id it was made into, bud transferred will show the weight of bud transferred to another location from this plant, bud wholesale quantity and bud wholesale $ is the quantity sold and the dollar amount it was sold for from this plant, Bud retail quantity and bud retail $ will show quantity sold at dispensary, the report will show bud quantity and $ amount totals for combined wholesales and retails sales, it will continue to show the same information for any of the bi-products created from each plant and at the end it will show a total $ amount that is how much money that plant has brought into the company from that plant.

I) Yield Forecast

<table>
<thead>
<tr>
<th>Strain</th>
<th>Wet Weight</th>
<th>Bud Weight</th>
<th>Total % Loss</th>
<th>Avg % Loss</th>
<th>Group</th>
<th>Stems</th>
<th>Sugar Leaf</th>
<th>Fan Leaf</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acapulco Gold</td>
<td>1000.00</td>
<td>500.00</td>
<td>50.00</td>
<td>4.03</td>
<td>Acapulco Gold 11/18/2014 100.00</td>
<td>100.00</td>
<td>10.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Acapulco Gold</td>
<td>1000.00</td>
<td>500.00</td>
<td>50.00</td>
<td>4.03</td>
<td>Acapulco Gold 11/18/2014 100.00</td>
<td>100.00</td>
<td>100.00</td>
<td>10.00</td>
</tr>
<tr>
<td>Acapulco Gold</td>
<td>1000.00</td>
<td>500.00</td>
<td>50.00</td>
<td>4.03</td>
<td>Acapulco Gold 11/18/2014 100.00</td>
<td>100.00</td>
<td>100.00</td>
<td>10.00</td>
</tr>
<tr>
<td>Acapulco Gold</td>
<td>1300.00</td>
<td>437.50</td>
<td>66.35</td>
<td>4.03</td>
<td>Acapulco Gold 11/18/2014 100.00</td>
<td>230.00</td>
<td>230.00</td>
<td>130.00</td>
</tr>
<tr>
<td>Acapulco Gold</td>
<td>1000.00</td>
<td>437.50</td>
<td>56.25</td>
<td>4.03</td>
<td>Acapulco Gold 11/18/2014 100.00</td>
<td>100.00</td>
<td>100.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
This report will take the time in grow and will use the harvest and cure information (Chapter 2.2.1M) to create a forecasted weight at future harvests for each strain. If users harvest the same strain continuously, this report will be more accurate the more harvests that are done. This report will need to be sorted by location but has the option to be sorted by strain, destination, days is how many days to forecast, use phases will take into account the phase change time to forecast the yields.

<table>
<thead>
<tr>
<th>Strain</th>
<th>1 Day</th>
<th>4 Days</th>
<th>15 Days</th>
<th>50 Days</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acapulco Gold</td>
<td>4777.30</td>
<td>3344.11</td>
<td>2368.40</td>
<td>4736.80</td>
<td>8121.41</td>
</tr>
<tr>
<td>Blue Dream</td>
<td>4777.30</td>
<td>3344.11</td>
<td>2368.40</td>
<td>4736.80</td>
<td>7105.20</td>
</tr>
</tbody>
</table>

The ratio report will show growers how many plants they are allowed to have and the amount of usable marijuana the store is allowed to have on hand based on the patient count assigned (Chapter 2.1.D) to that cultivation facility. This report cannot be sorted but it will show caregiver count, allowed plants, current plant count, allowed inventory and current inventory.

<table>
<thead>
<tr>
<th>Patient Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caregiver count</td>
</tr>
<tr>
<td>9</td>
</tr>
</tbody>
</table>

Chapter 3: Inventory
1) Setup

A) Rooms

*Inventory*→*Rooms*

Rooms can be made in the inventory to match the rooms at the user's facility. Keep in mind to make sure all products are removed from a room before deleting that room.

B) Tax Categories

The *Tax Categories* button can be found in the inventory screen on the right hand side under shortcuts. This will allow the users to set up different tax rates at the facility for wholesale and retail purposes. Keep in mind if the user is planning on using the price points button *(Chapter 3.1.H.1)* keep in mind it will always go by the tax standard rate, therefore users will probably want to use the tax standard rate for the marijuana tax rate. The total amount of taxes can be broken up to represent each different rate that's applied to the total rate (RTD Tax, City Tax, State Tax, etc.).

1) Tax Breakdown Types

*Inventory*→*Tax Breakdown Types*

Users can create custom tax rates as well if BioTrackTHC does not have every tax breakdown type needed at the facility.

C) Vendors

Each Vendor (Anyone the facility buys from or sells to on the wholesale level) will have its own profile in BioTrackTHC and can be made using the Vendor button on the inventory screen on the right hand side under the shortcuts. Each vendor can store the address, phone and fax numbers, email, website, license number (OPC Number), Contact, a check box if they are a mmip, notes and documents can even be scanned into the vendor files. Documents can be named by typing in a name in the Title section and clicking enter. Be sure to click save whenever updating or making vendor files.
D) Laboratories

Each Testing Laboratory will get its own profile in BioTrackTHC and is required before testing can be added to any inventory item. Each Laboratory can store the address, phone and fax numbers, contact email, website, license number, contact and internal notes. These notes are good in the case that users use more than one laboratory for testing, they can say this laboratory is cheaper or this laboratory processes information faster. Be sure to click on save when finished making a laboratory in BioTrackTHC. Delete will delete that laboratory from BioTrackTHC.

E) Strains

Strains are required in BioTrackTHC to create any plants and are essential for Users to track the genealogy of products. Users can keep track of the strain type like indica or sativa. A picture can be added and there is an area for quality rank, this is so the growers can rank the flower on a numerical scale and view ranking from the Strain Quality and Rank Report. Lastly users can add strain notes to store information about that strain. Most facilities use this for the strain information so if they are selling the product on the whole sale or retail level the user will have a place to go to find information about that strain and it will always be the same consistent information each time it’s accessed. Keep in mind more than one note can be added and can be viewed when creating the strains, in the Inventory Details (Chapter 3.2.A) window and can also be viewed on the Dispense Products (Chapter 4.2.D.1) window.

1) Strain Type

Growhouse>Strain Types

By default BioTrackTHC has 5 strain types; Indica, Sativa, Indica x Sativa, Sativa x Indica and Indica/Sativa 50/50. Users have the option to create custom strain types as well to cater to whatever need the user has.
F) Product Categories
Categories can be created from the inventory screen by clicking the Categories button on the right hand side of the screen under shortcuts. These categories are here to help the user keep organized with the inventory by allowing products to be placed into a category like “Flower” or “Accessories”. These categories can be added as price levels like “Top Shelf” and price points can be added to an entire category using the Price Points (Chapter 3.1.H.2) Button. These categories will be placed in the Customer tab so the budtenders can browse the categories to find the products that they are looking to sell. Kushit Enabled will allow BioTrackTHC to place the products in the inventory under this category on iKush.com for online purchase. Lastly, multiple reports can be sorted by category.

1) Inventory Room Exempt
This is category specific setting that will show any product in that category in every inventory room made. This is usually beneficial if the user set up the budtenders with their own room to pull from, they can sell any item in their room but also any item in this category.

G) Products
Using the Products Button, on the inventory screen on the right hand side under shortcuts, users can input all of the information about all the products they are going to carry at the facility. Keep in mind they are not putting in how much product they have just putting in the information about the product so users can add it into the inventory. Product information can also be modified or deleted from this screen. When making a product name the user has the option to choose the Strain and Inventory Type but Name, Category and Tax Category are required. An Icon can be created and uploaded with the Browse button, the Icon is displayed in the Menu in the Customer Tab for budtenders to browse by image. Vendor and Cost Per Unit are also optional information. These are important for buying from wholesalers, when filled out and clicking on the New Inventory Chapter 3.2. G) Button when the product is selected the vendor will automatically populate and if a quantity is placed and processed without a price BioTrackTHC will generate a cost for that transaction based on the cost per unit here. Cost Per Unit is also generate on the Current Inventory Report.

1) Inventory Types
Inventory>Inventory Types
Custom inventory types can be created as another tool to track products in BioTrackTHC, there are many reports that can be sorted by the inventory
type. This may be useful if users build price tiers with categories like “Top Shelf” but want to see total “Bud” sold from all categories.

2) **External Barcode**
   This feature is useful if the user has products that already have an existing barcode on the product like rolling papers or drinks but users can also create barcodes from here to use one barcode for all batches with this product name. Beware of generating external barcodes for marijuana product because when scanned the first in first out inventory sales kicks in and it will pull from the oldest batch until that batch is depleted and then move to the next one, this can be an issue if multiple batches are on the floor and the wrong batch is sold. Then the metric report will be showing inaccurate information about the oldest batch because the other batch was sold incorrectly. This would put the user’s oldest batch lower and the other batch higher in the inventory.

3) **Ingredients**
   A list of ingredients can be added here for users to view if needed. These ingredients can also be automatically placed on the inventory or customer label using the *Label Creator Tool (Chapter 3.1.J)*.

4) **Options**
   a) **Requires Inventory**
      This decides if the product is tracked in the inventory or if it is able to be sold but not tracked in the inventory. When unchecked the budtenders can sell it as much as they want and there is no inventory to be pulled from, a great tool for special orders or handouts.
   b) **Marijuana**
      This depicts if this products has marijuana in it such as flower, extracts and edibles. Products such as Accessories would not contain marijuana so they could be unchecked.
   c) **Requires Weighing**
      This will make this product a weighable or non-weighable (Countable) product in the inventory and customer tabs.
      1) **Usable**
         When its non-weighable but checked off as marijuana a box with Usable will appear, this is the usable amount of marijuana in the product. This is helpful in a few ways, when doing a *Conversion (Chapter 3.2.D)* if the user is trying to put a greater usable amount into the product they will be notified. Also the usable amount is deducted from the sales total when sold to a customer, using the *Sales Limits (Chapter 4.1.C)* tool users can avoid over dispensing if a total is greater than the legal limit the budtender will be notified.
   d) **Member Discount & Members Only**
      These apply to *Member Levels (Chapter 3.1.H.3)* and are allowing member discounts to be applied to the product and if member only checked off only members will be allowed to buy that product.
   e) **Pre-Packaged**
      This feature will state that this product is prepackaged and if checked off it will be sold as the amount of weight in the product. For example if the user have a price point set for $10 per 1G and the user sells a prepack that has a usable weight of 1.1G it will be sold for $11 (unless Weigh Heavy (Chapter 4.2.D.3) is used). This is useful if the user would like to have Pre-Packaged Flower and weighable Flower in the same price tier like “Top Shelf” then they can be sold together and still get the *Cumulative Price (Chapter3.1.H.1)*.
5) Price Point Table
Here the user can put in the price for that product. Keep in mind the products price can be set by the category using the Price Points (Chapter 3.1.H.1) feature to make data entry faster and useful when changing the price of multiple items at once. Users can also click on the Paste button to paste a price from another product in the inventory. See Pricing Below for setup.

H) Pricing (RETAIL)
Pricing can be set on products multiple ways and can be modified to fit the needs of the users. Whenever imputing pricing into BioTrackTHC the user will put in the quantity, grams for weighable products and counts for other items based on what is set in the Products (Chapter 3.1.G) window. Users can type in any amount and put in a price, when doing so BioTrackTHC will automatically fill in the price after tax. Therefore if the user puts in a price in Post-Tax BioTrackTHC will calculate the Price before tax.

1) Cumulative Price Points
Multiple price points can be inputted into BioTrackTHC and this will create a cumulative pricing structure, meaning the user can provide a discount to the customer for buying in bulk and BioTrackTHC will automatically discount the product if Cumulative is checked from the Dispensed Products (Chapter 4.2.D) window to the set prices in BioTrackTHC. Options for Cumulative Pricing (Chapter 4.1.F) will help fit the user’s needs.

2) Price Points
This feature will allow the user to put in price points for an entire category like “Top Shelf Flower”. Upon doing so any product in this category will be assigned the price structure made for that category. If a product is changed to that category it will also be assigned this pricing structure. This is also beneficial if the price changes for that category then the users can change that here and all products in that category will be assigned the new price made automatically. Be sure to click on save and apply when updating price points.
3) Inventory Grading
Grades can be assigned to specific batches of products in the inventory as well. This is useful if one batch tests higher than another or if one has a better quality. Grading can increase or decrease the price of the products by percentage or by price point. If by price point the price point on the grade will override any other price point assigned to that product so be sure to add Member Level pricing when making grading pricing structures. When a Grade is assigned to a batch the grade applied can be viewed from the inventory screen under the category column and if First In, First Out Inventory Sales (Chapter 4.1.B.1) is off budtenders will be able to see the grade when selecting the batch.

4) Member Levels
Options>Sales>Member Discount
Users can set up Member Pricing in BioTrackTHC for many purposes like Members, Employees, Seniors, Vets, etc. The Care assignment (MEDICAL) is member level specific and means that the plants assigned to any customer in that member level is added toward the plant count the facility is allowed to grow and can be seen in the New Plant window if New Plant Destination (Chapter 2.1.D) is on and on the Patient Ratio Report (Chapter 2.3.I). Users have two options for price change either Enable Member Discount Percentage or Enable Member Price Point Tables, if users use Enable Member Price Point Tables there is an option for Automatic Percentage Fallback feature that allows for both price points and percentage discounts, when no price point is available in the member pricing the product will receive a discount instead. Keep in mind if the users choose either Enable Member Discount Percentage or Enable Member Price Point Tables the user can only use that same option for all other levels, if changed on another member level all other will be changed to that option. Member levels can be set to customers in the Customer File (Chapter 4.2.A).

I) Inventory Transfer Options
There are a few options for transferring inventory, Simple Location Transfer and the Transfer Corrections Tool.

1) Simple Location Transfer
Administration>Inventory>Transfers
This option can have inventory that is transferred between locations show up instantly in the inventory. If it is not check the receiving location will need to open the Transfer Inventory (Chapter 3.2.H) window and scan the barcode or enter in the
barcode number of the product in order to recount the items upon arrival before going into the inventory.

2) Inventory Transfer Corrections
   Administration>Inventory>Transfer Corrections
   This feature will turn on Transfer Corrections (Chapter 3.3.C.2) in the Transfers Tab in the inventory screen. This will allow the user to adjust the date and time of the transfer and the weight or count.

j) Labels
   Options>Misc.>Customer Label
   The Custom Label Creator Tool allows users to create the inventory and customer labels printed at the facility. The inventory labels are printed from the inventory screen by clicking Print Label and the customer label is the label that is printed when a product is added to a sale from the Dispense Products (Chapter 4.2.D.5) window. These labels are meant to keep the facility compliant by printing labels with the required information for the containers storing and being sold that contains the marijuana product. Users can add many different objects to labels to complete the compliance requirements, when making the labels objects are placed on an X and Y axis where the top left corner being the X:0, Y:0 point. Increasing the X axis value with move the object horizontally on the label, increasing the Y axis value will move the object vertically on the label. Negative values can be inputted to compensate for margins on the label, for example -15 for the X offset to move it ¾ of an inch to the left on the label doing so may place the object off the preview area but will print correctly on the label. There are a few objects that can be added to the label; Custom, Image, Line, Testing and Variable.
   1) Custom
      This object allows users to put any text they write in the Custom Text field on the label. The user must include Font Size, X Offset (Horizontal Position), Y Offset (Vertical Position) and Text Wrap (How many characters before the text will wrap to the next line.).
   2) Image
      Users can add icons to labels here by browsing the file and uploading it then they will need to decide the size but entering the width and height it will be on the label (30 is about ¾ an inch) and also put in the X and Y Offsets for the position on the label.
   3) Line
      Lines can be made on labels as well to help divide information on the label. To do so the user must enter a Line Width and if they want the line to have dashes, then the user has to place the line using the X and Y offsets, the End X and End Y is where the line will end on the horizontal or vertical values. Sometimes when making lines they look crooked on the Custom Label Creator Tool but they might print straight.
4) Testing
Testing information that was entered onto the products can be printed on the label, the type of testing variable depicts what results are shown. Users can do individual results but if All Available is selected all the test results that were added to the product will show on the label. Keep in mind the information from testing is added directly to the batch of flower and using this variable when the label prints BioTrackTHC will automatically pull the testing information for the product the label is being printed for and place those results on the label. After the type of testing result is chosen from the variable dropdown box the user must input the font, X and Y Offsets (position on the label) and the Text Wrap (How many characters before the text is wrapped to the next line).

5) Variable
These objects are pieces of information about the product that can be placed on the label automatically. For example the Barcode Variable, when placed in the preview area it will show a barcode with all 4’s at the bottom but when printed it will take the barcode number for the product and make that particular products Barcode on that label. The size of Font, X and Y Offsets (position on the label) and the Text Wrap (How many characters before the text is wrapped to the next line) are all required for these type of objects.

6) Buttons on this screen
a) Copy
This button allows users to copy the label represented in the preview window to another location automatically. When doing so the user will also decipher whether it’s an inventory label or a customer label.

b) Print Test
This will actually print a test of how the label will print. FYI on some systems when printing a test will move the test print to the right and down about ¼ of an inch so if printing a test for the users labels click “ok” to exit the window and select a product and click Print Label, if the user is making a customer label go to the Customer tab and ring up an item to get a label to print. This will give the user an exact copy of what is going to be printed each time and if test results and objects with a lot of text has a Text Wrap this will give the user an idea if the Text Wrap was inputted correctly if text is running off the label or is overlapping other text.

c) Import/Export File
These buttons are for importing and exporting the BioTrackTHC Label Templates to other computers or systems using email or zip drive, if the user has a shared database this isn’t necessary. If the user wants to have the same label in different databases the user can export the file and import it into the other database.

d) Load/Save Template
This allows users to so save and load custom templates the users make from any location in the database. Users can also delete templates from here.

e) Move All
This button will allow the user to move all of the objects in the preview area at once.
2) Inventory Functionality

A) Inventory Details Window

The *Inventory Details* window stores information for each batch of product in the inventory. The window might show different information for different products; for example when a product does not weighable but contains marijuana the usable box will show the amount of usable marijuana in that countable marijuana item. The Barcode is the internal batch number for the product. Type, Strain, Product (Name assigned, made with the Products (Chapter 3.1.G) Button), Grade (if Inventory Grading (Chapter 3.1.H.3) is being used), the check boxes “This item contains marijuana” and “This item requires weighing” (assigned with the Products (Chapter 3.1.G.4.b&c) Button), Batch (if PO Include External Batch (Chapter 6.2) function is on), Expiration Date, Cost (Also carries from the New Inventory (Chapter 3.2.G) window), Package Weight and Package Date (Also carries from the New Inventory (Chapter 3.2.G) window), Usable Weight (Made during Conversions (Chapter 3.2.D) or carried from the New Inventory (Chapter 3.2.G) window) can all be modified from this window. Available is how much, in weight or by count, is in the current room and Total is the total amount, in weight or by count, in the entire inventory rooms, both cannot be modified unless the Adjust (Chapter 3.2.C) or the Move (Chapter 3.2.E) features is used.

1) Tabs in this window

a) Notes

Notes can be added to the product from here to convey information about the product; these are also brought over from the Notes tab in the Modify Plant (Chapter 2.2.D.1.a) window. The New and Save Buttons apply to the notes.

b) Strain Notes

These are carried from the Strains (Chapter 3.1.E) button and can even be modified from here.
c) Custody
   This tab will show the location of the product, who handled it, the time and date it was handled and the weight or count upon handling.

d) Sales History
   This will show who the product was sold to, quantity, who sold it and the date and time of each sale.

e) Plants
   This is all of the plants tracked by BioTrackTHC, if batches are combined the plants from the other batch would be added to these.

f) Testing Results
   Testing can be entered into BioTrackTHC and can even be placed directly on labels automatically using the Custom Label Creator Tool (Chapter 3.2.1). To enter or modify results the user must click the Modify Results Button. There is also an option to Export Document, when modifying the testing results users can Attach Document into BioTrackTHC for storage on the batch of product it applies too, the Export Document button will allow the user to review the testing documentation imported to the batch. When modifying the results users will need to select a Laboratory (Chapter 3.1.D), enter in the Amount (is % unless set to MG/G or something different with Testing Types) with the option of < Less than symbol, choose the Profile (Can be modified using Testing Types), chose the date the test was done and Add will apply that test result. Repeat the process to add all the test results from the laboratory. Remove will allow a user to remove a selected test result. The Attach Document button allows users to save testing documentation sent from the laboratory directly to this batch of product in the inventory and can be retrieved by using the Export Document button on the Inventory Details window.

1) Testing Types
   Administration>Inventory>Testing Types
   Custom testing results can be added if BioTrackTHC does not contain all testing types desired. When adding a testing type the user must name it, enter the units of measurement and can add details about that testing type.
2) Buttons on this window
   a) Print
      This button will print the barcode for the product.
   b) Adjust
      This button will open the Adjust (Chapter 3.2.C) window and the user can adjust the weight or count.
   c) Convert
      This button will open the Conversion (Chapter 3.2.D) window so the user can convert this product into a new product of the user’s choice.
   d) Transfer
      This button will open this item in the Transfer Inventory (Chapter 3.2.H) window so it can be transferred to another location, vendor or laboratory.

B) Combine
   This feature allows users to combine multiple batches of product together. When batches are combined all the information and the weight is combined from all the products under one new batch number. To combine product select the items intended to be combined and click the combine button, users can combine multiple different strains into one as well.

C) Adjust
   This feature allows the user to adjust the weight or count of products in the inventory. To do so users can select a product in the inventory and click the Adjust button or they can click on the Adjust button in the Inventory Details (Chapter 3.2.A.2.c) window. From here BioTrackTHC will show the product name, barcode and current weight, the user will need to enter the new weight, upon doing so this will immediately show the difference in grams/count (OZ if weighable) and a percentage of variance. Users can use the Container (Chapter 2.1.J) Feature as a tear weight for the product on the scale. Users are required to put a reason they are removing that product and this action will be recorded and can be viewed on the Inventory Adjustment Report (Chapter 3.4.C).
D) Conversions
This feature allows users to Convert product into new products, such as weighable flower into 1g pre packs or trim into oils. Users can even convert product into the same product if they are trying to break it up into smaller batches. To do a conversion the user must select the product in the inventory screen and click on the Convert button or the user can click on the Convert button from the Inventory Details (Chapter 3.2.A.2.c) window. When the inventory conversion screen comes up the user will see the product they are trying to convert and the weight or count of that product. At this point the user will select the new product they are making and weigh or count the amount product to be converted in the Conversion Quantity box, the user must click on next to move to the next field New Product Quantity where the user will put how many new products were created using the Conversion Quantity. When clicking finish the product will be created and put into the inventory.

Keep in mind BioTrackTHC will calculate the amount of usable weight when making pre-packaged items, so if the user uses 360g of flower to make 100 pre-packaged 1/8 BioTrackTHC will assign each product a usable weight of 3.6g unless the Auto-Waste box is unchecked. There are three boxes off to the right, first off Auto-Print will start to print the barcodes for the product the user made. Auto-Waste by default will be checked off and cannot be unchecked when making concentrates, when making a concentrate BioTrackTHC will automatically generate how much waste is produced based on how much oil was created, so if the user used 100g of trim to make 10g of oil BioTrackTHC will count 90g of trim as waste only leaving 10g of oil in the inventory. For flower and pre-packaged items when unchecked the user may input how much waste was generated while making the prepacks and that weight will not be applied to the usable amount for that product, so if the user had 360g of flower and the user makes 100 3.5g prepacks the user can input 10g of waste and BioTrackTHC will make that product consider 10g waste and make the usable amount on the product 3.5g if Auto-waste was not used the usable amount would be 3.6g. Serialize will generate a barcode for each product being made, so if the user is making 100 products BioTrackTHC will make 100 barcodes one for each product made. When the conversion is finished if there is weight left in the product being converted the window will stay open to allow the user to continue to break down that product, if there is no remaining weight the window will close automatically. The Conversion Report (Chapter 3.4.E) will show any of the conversions done in BioTrackTHC and the waste produced from those conversions.
E) Move Items

When users have multiple rooms they are able to move product between rooms using the Move items button. The will select the product they want to move and click the Move items button, alternatively users can click on the Move items button then scan the barcodes of the products being moved. Then the user will need to select the new the products are to be sent to and reweigh or recount each item moving, this is because users can send partial amounts of products and that item will be in two different rooms with the same barcode number. This is useful for users that want to control how much product is on the sales floor at one time. Upon weighing or counting all of the products they will be moved into the destined room.

F) Inventory Audit

This feature is intended to help users keep track of the inventory and be sure they have an accurate count or weight of all inventory items, upon clicking the Inventory Audit button users will be brought to the audit screen and they can begin auditing the room that they were in when they clicked the button. From the Inventory Audit window users will be able to switch to the bulk inventory room from whatever room they are in and they can choose categories that they would like to audit, All Categories is set by default. This is useful if the user want to use the Print Sheet button to have each employee audit each category. Print Barcode will reprint the items barcode. Users will need to weigh or recount each item and submit the information by highlighting the product and entering the count or weight to the right or by using a connected scale, Containers (Chapter 2.1.1) can be used as a tear weight for pre-weighed containers being used. If an item is over or under BioTrackTHC will show those values in red if it’s a negative value and green if it’s positive, the inventory will be adjusted automatically when the audit is completed. Users can add notes to explain why they think this item is short or maybe a reason why they are being removed. Audits can be saved for up to 24 hours using the Save Later button, if a product is sold that
had already been counted BioTrackTHC will alert the user and have them recount that item. An Audit Report (Chapter 3.4.D) can be run to see what items were short and the notes for why.

G) New Inventory
This will allow users to input products into the inventory, when clicking the New Inventory button the New Inventory window opens. When adding new product to the inventory users can select the vendor they are buying the product from, product can still be added if a vendor is not selected for new users that are inputting inventory for the first time and if the vendor is selected in the Products (Chapter 3.1.G) window. When selecting the window will change to the product type depending on if it requires weighing or if it contains marijuana also based on the Options set in the Products (Chapter 3.1.G) window. The user then can enter all the information relevant to the product; Quantity or weight, Usable, Room to be sent to, Item Price (Total cost) (If Cost Per Unit was entered on the Products (Chapter 3.1.G) window the Item Price can be left blank and BioTrackTHC will automatically calculate the price for that product.), Package Weight (Optional), Grade (if Inventory Grading (Chapter 3.1.H.3) is being used) and lastly the Batch No. (This will show up in the Batch field on the Inventory Details (Chapter 3.2.A) window) at the bottom. After filling out all the fields desired the user will click Add to apply that product to the box above, it will not get a barcode number until the Create button is pressed. If a vendor was selected then the user can also put in information into the Wholesale area by selecting the type, Purchase or Trade, Method (of Payment) and Tax rate to be applied. There are 4 methods of payments; Cash, Checks, Credit and None. If none is selected the transaction is sent to the Accounting (Chapter 3.3.D) tab so the user can set up consignment deals or set to pay the vendor back at a later date, further more if a user uses another method of payment and changes the Paid amount the remaining amount will be sent the Account Tab. When the Create button is pressed the barcode numbers and the products will be created and put into the inventory. After that the user may click the Generate P.O. button to automatically generate a purchase order for this transaction, these can also be generated from the Transfers (Chapter 3.3.C.1) Tab.
H) Transfer Inventory
This feature allows users to transfer inventory to other locations, Vendors and Laboratories (Chapter 3.1.C&D) that have been entered or to accept product from another location in the database. When using the Transfer Inventory feature users must select the Xfer Type whether full or partial. Then users must select who they are transferring to, when transferring to another location users can use the Simple Location Transfer (Chapter 3.1.I.1) feature to have the products show up in the inventory as soon as its transferred, if not users will have to use Transfer Inventory to recount or weigh the items as they come into the inventory by scanning the barcode or clicking the Lookup button, when doing so the product will be shown as inbound and the user can count the item into the inventory. When sending product to Laboratories or locations in the database the Wholesale window will not populate. After filling out the Count or Weight and Item Price (Total Cost) the user can click on Add To Transfer to save that information about that product in order to move on to the next one. If a vendor was selected the user can also fill out information in the Wholesale area by selecting the type, Sale or Trade, Method (of Payment) and Tax rate to be applied. There are 4 methods of payments; Cash, Checks, Credit and None. If none is selected the transaction is sent to the Accounting (Chapter 3.3.D) tab so the user can set up consignment deals or set to pay the vendor back at a later date, further more if a user uses another method of payment and changes the Paid amount the remaining amount will be sent the Account Tab. Users can also Generate an invoice by checking off Generate Invoice above the Transfer All button, these can also be generated from the Transfers (Chapter 3.3.C.1) Tab.

3) Inventory Tabs
The Inventory screen has several tabs that’s users can perform various actions from and track things like sales and transfers from the inventory screen.

A) Dispensed
This will show the user how much was dispensed at the dispensary during a specific time range. This is broken up by product and customer that bought the product. The Details button will open a window that will show the information from the sale.
B) Sales
The Sales tab is where users can review the sales tickets for any date range of the user's choice and can also be sorted by Users or Terminals. This is also where users can void or refund any tickets done in BioTrackTHC.

1) Tickets
The ticket tab allows users to view the sales tickets and expand them to see the details about that sales ticket such as discounts applied. Users can use Print Ticket and Print Labels to reprint receipts and labels for packaging.

a) Voids
This is also where users can void transactions in BioTrackTHC by selecting the sales ticket and clicking the Void Ticket button. If any void is done it will be placed on the Voids Report (Chapter 4.4.R) and all of the items from the sales ticket will be placed back into the inventory and the register will be adjusted to not include that sale for the Cash Close (Chapter 4.4.L).

2) Payments
This tab will only show a list of the transactions, the method of payment and the amount. Users have the option to search by date range and there are a few buttons at the bottom as well.

a) Modify
This will modify any transactions payment type, so if someone paid with a debit card but the user wants to refund cash then the user can modify the payment from debit to cash then refund the sale to give the cash back.

b) Refund
Users can even process refunds from here by highlighting the transaction they would like to refund then click the Refund button. When doing so the Refund window will open and show all items bought in that sales ticket, users can check off the items they want to return and they can change the amount to be returned too. Restock means that the user wants the product put back into the inventory upon refunding the ticket.
C) Transfers
Anytime a user uses the New Inventory or Transfer Inventory (Chapter 3.2.G&H) buttons those actions are tucked here. Users can view every detail of the wholesale transactions and inventory transfers. The can also search by date range and can reprint barcodes for any products transferred by selecting the item and clicking the Print Barcode button.

1) Void
The user can void any of these transactions by selecting one of the items and clicking the Void button, if the item was a part of a larger order the user will need to void the whole order and start over. When voiding the user must put in a reason for the void and the information for the void will show on Voids Report (Chapter 4.4.R) and all of the items from the New Inventory button will be taken out of the inventory and all of the items from the Transfer inventory button will be placed back into the inventory and the register will be adjusted to not include that wholesale transaction for the Cash Close (Chapter 4.4.I).

2) Generate P.O.
This button will allow users to repopulate any Invoices or Purchase Orders from any item brought in or sold using the New Inventory or Transfer Inventory (Chapter 3.2.G&H) buttons.

3) Correct Transfer
This will allow users to change the date and time as well as the quantity or count for any inbound or outbound transaction. The Inventory Transfer Corrections (Chapter 3.1.I.2) feature must be enabled to use this button.
D) Accounts
This tab will show any transaction, Retail or Wholesale and inbound or outbound, where the user selected none for payment in the New Inventory or Transfer Inventory (Chapter 3.2.G&H) buttons or if the user used the account Payment Method (Chapter 4.1.M) option and selects that for a retail sale.

1) Receivable/Payable
There are two types of accounts, Receivable which is money that is owed to the facility and Payable which is money the facility owes. Users must select an account type to view any information about accounts.

2) Payout
This button will allow the user to make a payment on an account from the Add Payment window. Users can input partial amounts in the event of split payment or consignment. When the account is paid off it will be removed from the accounts tab. If it was a Wholesale transaction the information for the payment can be found on the Wholesale Payment Report (Chapter 3.4.N). If it was a retail account the payment information can be found on the Payments Report (Chapter 4.4.N).

3) Close out
This button means this account was not and will not get paid off and will be counted as a loss in BioTrackTHC. These are considered Bad Debts and can be found on the Bad Debts Report.

E) Payouts
This tab will show all the Payouts (Chapter 4.2.O) made in BioTrackTHC for any date range of the users choice. Payouts can be voided from here using the Void Payout button. These payouts can also be viewed on the Payouts Report.
4) Inventory Reports
   
   A) Current Inventory
      
      The **Current Inventory Report** will show the user the current inventory and can be sorted many different ways; Location, Room, Strain, Product (Name), Category, Type, Grouping (by default grouping is by product which will combine batch numbers under one product name, if the user would like to see the Usable and Batch numbers select no for the Grouping), Weighable, Medicated (Marijuana), Grade (if Inventory Grading (Chapter 3.1.H.3) feature), Destination ( Assigned in the Growhouse tab at the New Plant or Modify Plant (Chapter 2.2.D.2.g) windows), and Out of room stock (if searching one item in a particular room when Include is selected it will show the inventory in all other rooms at the location selected). The report will show a variety of information gathered about the products; Location, Product (Name), Category, Strain, Type, Remaining, Usable, Batch # (if Grouping is set to no), Cost per unit (entered in the Products (Chapter 3.1.G) window), Total Cost (cost per unit x amount of product), Value per unit (price set in Products (Chapter 3.1.G) window, price is the basic 1 unit or g price), Total Value (Price x amount of product), Potential profit per unit (Cost per unit Price), Total Potential profit (Total Cost Total Value), Grade (if Inventory Grading (Chapter 3.1.H.3) is being used), Room data (Weight or count in the room, will show all rooms it is in if more than one), Total on-hand (Total unless sorted by room, then it shows on-hand in the room).

   
   
   **Current Inventory**

<table>
<thead>
<tr>
<th>Product</th>
<th>Category</th>
<th>Strain</th>
<th>Type</th>
<th>Remaining</th>
<th>Usable</th>
<th>Batch #</th>
</tr>
</thead>
<tbody>
<tr>
<td>AK-47 1G PrePack</td>
<td>Pre-Packaged</td>
<td>AK-47</td>
<td>Bud</td>
<td>1.00</td>
<td>1.00</td>
<td>4573 9250 6790 2766</td>
</tr>
<tr>
<td>AK-47 28G PrePack</td>
<td>Pre-Packaged</td>
<td>AK-47</td>
<td>Bud</td>
<td>1.00</td>
<td>28.00</td>
<td>1431 5265 3513 3062</td>
</tr>
<tr>
<td>AK-47 28G PrePack</td>
<td>Pre-Packaged</td>
<td>AK-47</td>
<td>Bud</td>
<td>13.00</td>
<td>28.00</td>
<td>4235 2620 9195 9718</td>
</tr>
</tbody>
</table>

   B) Historical Inventory
      
      The **Historical Inventory Report** will show the user the inventory on a specific date and can be sorted many different ways; Location, Room, Strain, Product (Name), Category, Type, Grouping (to group together all the products with the same name), Weighable, Medicated (Marijuana), Grade (if Inventory Grading (Chapter 3.1.H.3) feature). The report itself will show a variety of information gathered about the products for that date; Location, Product (Name), Category, Strain, Type, Remaining, Batch # (will be blank if Grouping is set to yes), Cost per unit (entered in the Products (Chapter 3.1.G) window), Total Cost (cost per unit x amount of product), Value per unit (price set in Products (Chapter 3.1.G) window, price is the basic 1 unit or g price), Total Value (Price x amount of product), Potential...
profit per unit (Cost per unit - Price), Total Potential profit (Total Cost - Total Value), Grade (if Inventory Grading (Chapter 3.1.H.3) is being used).

C) Inventory Adjustments
This report will show anytime a user used the Adjust (Chapter 3.2.C) feature to change the weight or count of a product in the inventory. It must be sorted by date range but users also have the option to sort it by Location, Product or Category. It will show the Product (Name), Barcode, Old qty (Starting Quantity), New qty (Quantity after conversion), Difference (old qty - new qty), Percent (Percentage of adjustment), Date, User, Reason (Users are required to input a reason).

D) Inventory Audits
This report will show the information generated from when the Audit (Chapter 3.2.F) feature. Users are required to have a start and end date, but this also allows users to see multiple audits on one report. Users also have the option to sort by Location, Product or Category. The report shows; Location, Product (Name), Barcode, Old qty (quantity reflected in inventory), New qty (counted amount), Difference (Amount of change), Percent (percentage of loss), Date (of audit), User, Reason (entered into the Notes field).
E) Inventory Conversions

This report will show the user any Conversion (Chapter 3.2.D) done in BioTrackTHC. Users must select a date range but can sort the report by location or search a MITS ID number. The report will show; Date (of conversion), Original product, Original strain, Original inventory id, Original inventory quantity, Original inventory new quantity (quantity after conversion), New product, New strain, New inventory id, New inventory quantity, Conversion waste and the user.

F) Inventory Forensics

This report will track every action that takes place in the Inventory and Customer Tabs and will help users track down what happened to products or to see who did an action to a product, with the sort options available the user can search for anything they might need to find. This report is ran by date range and can be sorted by a bunch of different ways; Location, Strain, Product (Name), Category, Inventory ID, Action, Sort (Newest first or Oldest first), Line Item (Will put all the information on one line), Inventory Type. This report will show; Name, Inventory id, Location, Previous quantity, New quantity, Difference, Date, User (who performed the action), Action, New Product, Grade (if Inventory Grading (Chapter 3.1.H.3)is being used), Usable (amount of marijuana), Previous room data, New room data and Inventory type.
G) Inventory Room Transfer
This report will show anytime a product was moved between rooms so users can keep track of what's been moved. This report does need to be run by date range but can be sorted by location. When the report is run it will show; Location, Strain, Date, Amount (Moved), Old room, New room, Employee.

H) Inventory Shrinkage
This report will show anytime a product was adjusted from the inventory by using the Adjust or Audit (Chapter 3.2.C&F) features. This report does not need to be run by date range but can also be sorted by Location, Include (Audits and Adjustments or either of the two alone), Category and Threshold (amount of units adjusted to show on this report).

I) Inventory Transfers
This report will show all the transfers to and from the inventory using the New Inventory or Transfer Inventory (Chapter 3.2.G&H) functions. This report needs to be run by date range but can be sorted a bunch of ways; Location, Direction (In or Out), Vendor, Strain, Weighable, Type, Transfer Type (Internal, location to location or External, vendor to location or location to vendor), Grouping (Keeps transactions grouped). When the report is run it will show; Location, Date, Product, Strain, Inventory id, Quantity, Weight, Direction, Vendor, Cost.
J) Tax Breakdown
This report can be found under miscellaneous and will show all the Tax Rates (Chapter 3.1.B.1) broken down in dollar amount for the time period selected. This report can also be sorted by location.

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Locations</td>
<td></td>
</tr>
<tr>
<td>&quot;Grow&quot; House</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>71.49</td>
</tr>
<tr>
<td>County</td>
<td>54.99</td>
</tr>
<tr>
<td>State</td>
<td>126.48</td>
</tr>
<tr>
<td>&quot;Grow&quot; Dispensary</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>496.06</td>
</tr>
<tr>
<td>County</td>
<td>228.19</td>
</tr>
<tr>
<td>State</td>
<td>119.06</td>
</tr>
<tr>
<td></td>
<td>843.31</td>
</tr>
</tbody>
</table>

K) Wholesale Payments
This report will show any payments made to or from the facility from the New Inventory, Transfer Inventory (Chapter 3.2.G&H) functions and using the Accounts Tab (Chapter 3.3.D.2). This report can be sorted by Location, Method (of Payment), Transaction Type (Sale or Purchase) and Vendor. The report shows the Date of payment, Name of the vendor, Method of payment, Amount and Transaction Type.

<table>
<thead>
<tr>
<th>Inventory Transfers (MITS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

| Start: | 04/30/2015 12:00:00 AM |
| End:   | 04/30/2015 11:59:59 PM  |
| Location: |             |
| Type:  | Sale         |
| Vendor:|             |
L) Wholesale Report
This report will show all the wholesale transactions that took place from the New Inventory or Transfer Inventory (Chapter 3.2.G&H) functions. Users will need to sort it by date range and by Type (Purchase or Sale) but can also sort it by Location and Vendor. When ran it will show Location, Name of the vendor, Price, Tax, Total Price, Terminal, User and date.

M) Wholesale Tickets
This report will show all the wholesale tickets that took place from the New Inventory or Transfer Inventory (Chapter 3.2.G&H) functions. Users will need to sort it by date range and by Type (Purchase or Sale) but can also sort it by Location, Employee and Vendor. When ran the report will show the time it was sold, the item that was sold, the vendor, Quantity, Subtotal and price, Tax and Tax %, the Total for each item and the Total for the transaction.
N) Accounts
This report will show any Accounts (Chapter 3.3.D) created using the New Inventory or Transfer Inventory (Chapter 3.2.G&H) buttons or if the user used the account Payment Method (Chapter 4.1.M) option and selects that for a retail sale. Age and Type are required when running this report but can be sorted by Location, Vendor and Customer. When ran it will show Each Account, the vendor or customer the account belongs to, the date of transaction, Outstanding amount still owed, Total amount, Age of the account and Type either Retail or Wholesale.

Chapter 4: Customers

1) Setup
A) Sales Screen
Options>sales>sales Screen
This Feature allows users to Change the Customer Tab view in the Menu area. They can select between Icon or List View and if by Icon the Icon Orientation either Vertical or Horizontal and how many per row before wrapping to the next line.

B) Sales Options
Options>sales>miscellaneous
There are a few options here that users should be aware of and can be beneficial, applied correctly the user can avoid compliance issue like selling the wrong batch number or over selling a particular item.
1) First In First Out Inventory Sales
This feature will allow the user select any when ringing
up a customer and if more than one batch exists BioTrackTHC will pull from the oldest batch in the inventory until it is depleted before moving to the next item. This can cause issue because the wrong batch could be sold and the incorrect information will be generated on many of the reports that are in the system. If this option is off and there is more than one batch in the inventory the user will be prompted to select the batch the user is selling.

2) Allow Negative inventory sales
   If this feature is on it will allows users to sell a product out of the inventory as many times as they want even after the total amount is depleted. The only way to view those negative totals is to run the Inventory Forensics Report (Chapter 3.4.F). It is recommended to leave this off otherwise MITS information could be reported inaccurately.

3) Show Out of Stock inventory
   This feature will show out of stock items with a red background in the Menu, if unchecked those items will not be shown in the menu for easy navigation.

4) Require Instant Discount Reason
   This setting will make users giving out On The Fly Discounts (Chapter 4.2.I) enter a reason for giving out the discount. When not checked the users will not need to enter a reason for the discount.

C) Sales Limits
   Administration>Sales>Sales Limits
   This feature allows users to set either warnings or even block a sale in the event that the sales are trying to be sold outside the hours of operation. It will also help eliminate over dispensing by warning or blocking a sale if the sales limits set are exceeded. There is also a setting for Disallow Per-Patient Override. When checked off the limit shown in this screen will be the only amount allowed to sell in BioTrackTHC but if this box is left unchecked Patients who are allowed to buy larger quantities would be able to by up to the limit designated on the Customer File (Chapter 4.2.A.2). The last ways users may warn or block a sale if for Card Expiration, meaning if the information for the medical card expires BioTrackTHC will warn or block the sale to keep the facility compliant.

D) Customer Options
   1) Authorization
      Administration>Customers>Authorization
      This feature allows the users to turn on finger print scanning for the customers so they would need to scan their fingerprint when checking into the facility.
2) Custom Fields

Administration>Customers>Custom Fields
This is a feature to add custom fields to the Customer File (Chapter 4.2.A). The user will name the field whatever they would like and they have two options for the type of custom field, Text Box or Dropdown. Text box will leave and area on the customer file so users can type in any text they wish but with Dropdown users can add Choices to the drop down list for users to select which options applies to the customer. Users can also decide which custom column it will be and if it will popup when checking the customer in.

3) Document Categories
This will allow users to make multiple Document Categories for when users scan documentation into the Customer File (Chapter 4.2.A) in order to keep the documentation organized. Users can name the categories whatever they want.

4) Duplicate Protection

Authorization>Customer>Duplicate Protection
Here users can configure settings that relate to customer input. Enhanced Duplicate Protection will run a fuzzy database search every time a new customer is inputted. If there are any matches based on the fuzzy factor that has been set, the employee attempting to input the new customer will be alerted to the possible matches. Rename Protection will alert an employee if they accidently try to update an existing customer’s information with a new customer’s information, based on the fuzzy factor that has been set. Fuzzy factors of 0 and 0 will catch exact duplicates only, whereas a factor of 1 would catch a miss-spelling such as Jon and John.

5) Referral Methods

Authorization>Customer>Referral Methods
This setting will allow the user to turn on static referrals (referrals entered from the Referral Methods window) When turned off users will have to type in the referral method each time instead of selection from a list of static referrals.

E) Check in Settings
This setting is related to checking customer in through BioTrackTHC. The Check-In Shortcut is located in the top left corner of the Customer File (Chapter 4.2.A) and allows quick access to check-in without leaving the screen. Disabling this will require a user to click the Check-In button on the Customer Lookup screen. The Auto-Minimize feature will automatically minimize the customer lookup screen after a successful check-in. If a customer is looked up from the sales screen, as opposed to the customer lookup screen, the Check-In Prompt will prompt a user if they would like to check the customer in.

F) Cumulative Pricing
Options>Sales>Cumulative Price Points
This setting is used to set how the cumulative pricing (Chapter 3.1.H.1) will work in BioTrackTHC. Enabled will have cumulative checked off on all dispense products (Chapter 4.2.D) windows. Selective means they can only use cumulative pricing if the products selected are in the same pricing structure. Cascading means as soon as the cumulative pricing reaches the top tier it will reset to the base cost for that item. The Advanced feature allows users to interactively select which items should be cumulative.

G) Weight Heavy
Options>Sales>Weight Heavy
This is the settings for the weigh heavy feature and there is also one setting for Cumulative Pricing well. Here users can set weigh heavy to be checked off by default on any dispensed Products (Chapter 4.2.D) windows. Also they can set how cumulative pricing will work with weighing heavy, either by item or by sale, if by sale then BioTrackTHC will add the weights of all the products being grouped together for weighing heavy before applying the price break, if by item the price break for weigh heavy will be applied to each line item before the products are grouped for cumulative pricing. Then the user can select how weighing heavy will work; to the nearest gram, to the nearest price point or the nearest of either.

H) Budtender Screen
Options>Sales>Budtender screen
This is where users can set the printing options from the budtender screen as far as automatic printing but users also have the option of using Strain Note (Chapter 3.1.E) Enabled meaning those notes will show on the weighable dispense products (Chapter 4.2.D.1) window. Users also have the option to Auto-add non weighable items to bypass the dispense products (Chapter 4.2.D.2) window and instant apply that item to the sale.

I) Sales insights
Options>Sales>Sales insights
This is a feature to show items the customer may also want based on the sales at the facility or based on sales to customers with similar conditions, it's a great upselling tool. These upselling items will populate in the Customer Tab under the subtotal. It will look similar to “People who bought similar items also bought: AK-47” and users can even click on the name of the product to begin ringing up that item.

J) Discount Taxing
   Options>sales>Discount Taxing
   Here the user can enable/disable discount taxing, whereby the tax is taken on the original price of an item, and not the discounted amount.

K) Loyalty Programs
   There are two loyalty programs users can build into BioTrackTHC. One is about loyalty points and the other is more of a loyalty program. Both of these programs can be ran individually or in tandem together.

   1) Modify Program
      Administration>Loyalty>Modify Program
      This feature is beneficial to users because when this loyalty program is built BioTrackTHC will put the name of the loyalty program under the customer’s name in the check in box but also will automatically apply this discount if the customer is eligible for the loyalty program. These loyalty programs can be named and the Code is the name that will show on reports. Furthermore users can base the program on amount spent or number of visits and can set the frequency to onetime or reoccurring program. Amount refers to the number of visits or amount spent in the Based on dropdown and max redeemable is how many times they are allowed to receive that loyalty program. Discount is Taxable means the discount will be taxed, Cumulative eligible means that they can still get the cumulative pricing (Chapter 3.1.H.1) and still receive this discount with that pricing. Members only means this loyalty program only applies to any member level that is not the “Non-member” level. Users can set up discounts by discounted dollar or percentage amounts but can also build in price points for categories or specific products applied in the program with the price override tab. Users can also select what products will be eligible for this loyalty program, they can
add more than one item
but can add objects by
Product Attributes
(Weighable or non-
weighable, items that are medicated),
Product names, Product categories or all
items.

2) Points System Setup

*Administration>Loyalty>Point System
Setup*

This feature allows users to set up a
loyalty points system where they can
delegate how many points each customer
gets for each dollar spent, Then they can
put in a dollar redemption value (how
many dollars the customer will receive) and the Per # of Points (how many points they need to
redeem the dollar value) discounts can be taxed but also customer referrals can be set up too so if a
customer refers a friend they can accrue points from the friend's purchases, the referral friend can
be set in the *Customer File (Chapter 4.2.A.3)*. Loyalty points can be applied to a sale by using the
*Loyalty Points (Chapter 4.2.K)* button.

1) Discount Programs

The *Discount Programs* button can be used to make discounts in BioTrackTHC for various reasons to fit
the user's needs. The user must put in a name and Code (name that will appear on reports) and will also
need to enter the Max Uses Per Ticket (how many times it can be placed on one transaction). Then they
must select the options to the right whether the discount is exclusive (is not allowed to be used with any
other discount), Discount is taxable (to charge
tax on the discount), Cumulative eligible (Can
get bulk discount from the *Cumulative Pricing
(Chapter 3.1.H.1)*, also if it's only for members
(any member Level (Chapter 3.1.H.4) that is not
non-member) and last ly there is a tab for limits
on how often they are allowed to receive this
discount (only works if the *Customer File
(Chapter 4.2.A)* is created for the customer).
Discount programs can also generate barcodes
to easily apply discounts to transactions. After
filling out the options users will need to set up
either the discount in dollars or percentage and select what items are eligible for the discounts by
product attributes, product names, product categories and all items. These discount programs can be
found in the menu under categories and discounts.
M) Payment Methods

*Administration>Customers>Payment Methods*

This feature allows users to determine the method of payments accepted at the facility. Keep in mind if users use the Account payment type that is like a tab for the users' customers and can be paid from the *Accounting Tab (Chapter 3.3.D).* When an item is checked off that method of payment will show on the *Pay (Chapter 4.2.M)* window.

---

N) Receipts

*Options>Misc.>Receipts*

Using these feature users can customize how they customer receipts will print out. Font size is how large the font will be, 6 is usually very legible. Page width is how wide the receipt is in pixels. The X and Y offset are where the product names that are being sold will start and the location on the receipt, the 2<sup>nd</sup> offset applies to the middle column usually containing quantity on the receipt and where it will start and lastly the 3<sup>rd</sup> offset is the last column usually containing price and totals. The center offset is where the text to be centered as the middle point on the receipt, this includes location info and Additional text. Line spacing is how many lines it will space between each line. Text wrap refers to all lines and how many characters before the text is wrapped to the next line (mainly for product names that are longer). Character limit will limit the amount of characters for each item on the receipt. Auto receipt printing can be turned on to automatically print a receipt when a transaction is finished, users can also delegate how many receipts will print. The company’s logo can be placed at the top of the receipt and the Offset is the location the logo will appear at the top of the receipt. The user also has the option to use the character wrap (Text Wrap), Print a signature line, include the customer’s name but also include the employee’s name. The additional text is an area where users can set their own message to the customers.
0) Cash Close Options
   Options>Sales>Cash Close Options
   Administration>Customers>Cash Close
   Users have a few different Cash Close options in BioTrackTHC, the first one being found in the options dropdown will allow the user to delegate whether or not wholesale transactions are included when using the Cash Close (Chapter 4.2.P) feature. The second set of options found under the administration drop down allows users to set whether Cash Closes will be ran as Blind (Employees cannot see the expected amount). Also Close by terminal will allow the user to count each terminal using the Cash Close (Chapter 4.2.P) feature, if not checked the all terminals will be included when doing the Cash Close. And Terminal Select will allow users to select the terminal they are closing when using the Cash Close (Chapter 4.2.P) feature (useful if the user has a cash office in the back where the cash is counted.

2) Customer Functionality
   A) Customer File
      When ringing up a sale the users must look up the customer if they are Medical but if they are recreational they do not need to check the customer in but there are benefits to creating customer files for recreational customers like loyalty programs, marketing, referrals, customer history, etc. If the user is checking in an existing customer they can do these 3 ways, by scanning the ID, looking up the customer in the Lookup box or by Clicking the Customer Lookup Button. If it’s a new customer users can
click on the New Customer button, keep in mind the only difference between the New Customer and Customer Lookup is when clicking on New Customer button the new customer check box will be checked in the Customer File window. In this window there are a few different customer tabs that will store different information. Be sure to click on update or insert whenever working on a customer file to save any information entered on the customer file, if a user clicks the X or the cancel button the information will not be saved.

1) Basic Info
This tab will store some of the basic information about the customer and if medical a few of these fields are required. If a new customer file is being created users can swipe IDS to populate most of these fields automatically. The first and last name are always required on the customer file But users have the option of submitting birthdate. Some important but not required fields are the email, cellphone number and carrier, in order to use the Marketing (Chapter 4.3) tool which will send messages for free and will also be free for the customer. Keep in mind when entering Sprint phone numbers put a 1 before the number. The MMJ Card field and the Expiration date will be required if its medical and the sale cannot start until this field is filled out with a valid card and expiration date. Driver’s license is an optional field but a great way to store more information about the client. Referrals (Chapter 4.1.D.5) and Member Levels (Chapter 3.H.4) can also be set in this tab.

2) More Info
Will store more optional information for the customer like address, male or female, Plant Count (to be applied to the grow with New Plant Destination (Chapter 2.1.D) feature), Location (where the plants are being grown), Individual limit (if Dis allow Per Patient Override (Chapter 4.1.A) is not checked the customer can buy up to this amount), a caregiver can be selected (if the caregiver have a Customer File and caregiver is checked) and the Doctor that gave the MMJ card is an option, doctors can be
entered by clicking on the Doctors button and entering the information for that provider. There are also options for Tax Exempt (The customer will be charged the Tax Exempt Rate built in the Tax Categories (Chapter 3.1.8)), is considered a Vendor and lastly if they are a caregiver.

3) Marketing
Will tab will store the information such as the number of visits, spent to date and loyalty points remaining (Points Can be modified). The Customer Referral button applies to the Loyalty Point program (Chapter 4.1.K.2), if applied the customer in the Customer Referral box will accrue points from this customers transactions if setup. The Email Opt-In and Text Messaging Opt-In check boxes apply to the Marketing Tool (Chapter 4.3) if this customer will receive emails and text messages using that feature. The Create Loyalty Card button allows users to create loyalty cards with specific information; this can be setup by going to Administration> Loyalty> Customize Card and can use the Label Creator tool (Chapter 3.1.I) as instructions to this section as the same information applies.

4) Custom
This Tab will show any Custom Fields (Chapter 4.1.D.2) created so the user can input the data desired about the customer.

5) History
This tab will show everything that customer has ever bought from the facility. Users can browse these sales and reprint any receipts or customer labels. Users may also print a complete history if desired as well. This is useful if the customer can’t remember what he got last time and would like the same thing.

6) Notes
This area is a way to store information about the customer and these notes can be stored a few different ways:
Normal will leave that note on the file to be viewed anytime desired, Important will make the customer’s
name flash in the check in queue and Popup will make the note pop up in a text box containing the note about the customer each time they are checked in.

7) Conditions (MEDICAL)
This tab is where users can select add and remove conditions that the patient has. There are hundreds of conditions built into BioTrackTHC and can be searched by typing the name in the dropdown box. These conditions will help populate the Sales Insights (Chapter 4.1.1) that are viewed below the subtotal on the Customer Tab screen.

8) Caregiver
This tab will show all the patients this customer is a caregiver for and show them as a list.

9) Documents
Documents can be scanned on the right hand side of the customer file into the BioTrackTHC like driver’s licenses, medical cards, etc. Document Categories (Chapter 4.1.3) can also be created to help sort the documentation scanned. Documents can be named by typing a name in the Title area and clicks enter. To delete a document right click on the title in the Files box and an option will open to delete or move (to another document category). There are buttons at the bottom of this area that allow the user to Zoom in and out, Rotate or Pop-Out (opens Document in a separate window).

B) Check-in
There are 3 ways to check in an existing customer. Scanning the Id of the customer with the mag strip reader, using the Lookup box to search for the customer (if more than one customer meets that search criteria the user will have to choose the customer from a list) (Users can enter phone numbers to look up customers) and by using the Customer Lookup (Chapter 4.2.A) button. After the customer is checked in they are sent to the Check-in area on the lower right-hand side of the Customer Tab Screen with the customer’s name and if they are eligible for a Loyalty Program (Chapter 4.1.K.1) it will show the name of that program. Users can also remove customers from the check-in area with the remove button. Whenever customers are checked in they are sent to the Check-in Report (Chapter 4.4.B) that can be used to track everyone that came into the store, even if it was just a visit, if a customer is checked in then removed they will show on the Check-in report for the in and out time and it will show they did not buy anything. All terminals will show this tab and who is checked in. If the user has someone checking people in at the door they can check them in and the budtenders can select which customer they are dealing with when they click on the customer’s name.

C) Ringing up a sale
After checking in a customer (only required if Medical) the customer’s name will populate in the Check-in. A user can click on the customer’s name begin ringing up items for the customer, there are 3 options for adding items to a transaction. Keep in mind as products are added to a sale the Limit will populate with that items weight that’s counted toward the Sales Limit (Chapter 4.1.C). Keep in mind if First in First Out Inventory Sales (Chapter 4.1.B.1) is not being used and there is more than one batch in the inventory the user will be prompted to select the batch they are selling to help stay compliant and to always pull from the correct batch.

1) Scan the barcode
   Users can scan the barcodes of items to open the Dispense Products (Chapter 4.2.D) window or apply directly to the sale if it’s a non-weighable item and the Auto-Add Non-weighable Items (Chapter 4.1.H) feature is being used.

2) Lookup the product
   Users can type in names of product in the Lookup box on the upper right of the sales area, when doing so a list of similar items will populate so users can choose from that list.

3) Menu
   The Menu area is another way to ring up products, the users can browse by Category (Chapter 3.1.F) created in BioTrackTHC and view the Icons uploaded in the Products (Chapter 3.1.G) window. When the items are found the user can simply click on the icon.

D) Dispensed products
When the user finds the item they would like to sell to the customer they will be brought to the *Dispense Products* window that is different depending on if the product is weighable or not.

1) Weighable

When weighable products are rung up the *weighable dispense products* window will open. From here users can use the scale, type in the weight of the product or even click on the *Total area* to type in a dollar amount and BioTrackTHC will calculate how much can be dispensed for that amount after tax. If the *Strain Notes Enabled* (*Chapter 4.1.H*) is enabled the notes applied to the *Strain* (*Chapter 3.1.E*) will show on the right hand side. Users may also check off if the product is *Weigh Heavy* or if it’s *Cumulative* eligible. Upon clicking the *OK* button that product will be applied to the transaction.

2) Non-Weighable

When non-weighable products are rung up the *Quantity* window will open and the user can enter the quantity being sold and also has the option to apply *Cumulative Pricing*, *Weigh Heavy* and *Print Label*. In the *Budtender Screen* (*Chapter 4.1.H*) options there is a setting to bypass this screen and automatically apply the item to a transaction.

3) Weigh heavy

*Weigh Heavy* (*Chapter 4.1.G*) is a feature in BioTrackTHC that allows users to give a bit more product to the customer but charging the lower amount. For example if a bud tender is selling 3.6g to a customer and the price point is $35 for 3.5g, if *Weigh Heavy* is not being used the item will be sold for $36 but if *Weigh Heavy* is checked the price will be adjusted to the nearest price point or to the nearest gram and would charge this customer $35 for 3.6g.

4) Cumulative Pricing

*Cumulative Pricing* (*Chapter 4.1.F*) is the pricing structure set when entering the *Pricing* (*Chapter 3.1.H.1*) and if cumulative is checked this item will be adjusted to fit the price for the quantity of this item. For example if the user charges $10 for 1 item and $20 for 3, when selling to the customer if 3 items are rung up and *cumulative* is not checked that customer will be charged the full 1 unit cost at $30 for all 3 items, if *cumulative* is checked then BioTrackTHC will adjust the pricing to reflect the pricing tier so 3 items would ring up at $20.

5) Print Label
Users have the option to print a label that will print the Customer Label (Chapter 3.1.J) when the item is added to the transaction. Users also have the option to turn off the Auto-Print features from the Budtender Screen (Chapter 4.1.H) options.

E) Customer Tab Buttons
In the Customer Tab there are several buttons the budtender can use when ringing up a customer, these buttons will help them adjust, save and payout a sale.

1) Print a label
The first button will reprint the Customer Label (Chapter 3.1.J) when an item is selected then the Print button is pressed.

2) Remove one Item
This button will remove any selected item from the transaction.

3) Remove All Items
This button will remove all of the items on the transaction so the budtender can start over or check that customer out.

4) Edit an Item
This button with the pencil will allow the user to change the weight of the count of an item by selecting this item and clicking the Edit button. It will bring up the dispense products (Chapter 4.2.D) window so the user can re-enter the weight or count.

5) On the Fly Discount
This feature allows the budtenders to discount the item being sold by $ amount or by %. This option can be limited by a dollar amount able to give out per employee in the Permissions (Chapter 1.B.). From the On the Fly Discount window the user can delegate if they want to do $ or % and they can calculate with tax (apply the discount to the total after tax is applied) or set the discount to be taxable. The Discount Reason (Chapter 4.1.B.4) can be set to be required and will show on the Item Discount Report.

6) Save Transaction
Allows users to save a transaction for later, keep in mind this can only be done if they have a Customer File (Chapter 4.2.A) and checked in as a customer, if not the transaction will be lost when
the user clicks on this button. To retrieve the sale the user can click on the customer’s name in the Check-in (Chapter 4.2.B) area.

7) Apply Loyalty Points
When applying Loyalty Points (Chapter 4.1.K.2) they will be prompted with a window that will show how many points the user has, the user will fill out how many points the customer would like to use and in the last field it will show the discount amount to be applied to the transaction.

8) Pay
When the customer is ready to pay users can click on the Pay button to close out the sale with the method of payment. The Payment Methods (Chapter 4.1.M) can be customized to not show any option the user would like. Users may also split payment from here by entering a partial amount and clicking the payment method then they will be able to apply the rest of the amount to any other method. If a payment method is clicked before any amount is entered BioTrackTHC will automatically apply the full amount to that Payment Method. Upon clicking done the transaction will be completed and the receipt will print up, then a box will pop up and the budtender has a few options; Print Receipt (Re-Print), Email Receipt (if email is in the Customer File (Chapter 4.2.A.1)) and Print Label (Customer Label (Chapter 3.2.J)). When done is clicked the transaction will be gone and the budtender can move to the next customer in line.

F) Voids & Returns
Users have the option to Void and Refund sales in BioTrackTHC and the Permissions (Chapter 1.B) can be set so only authorized users can perform these actions. Both actions are done from the Inventory Tab under the Sales Tab.

1) Void
Chapter 3.3.B.1.A
A Void will permanently delete a sale from BioTrackTHC and the information from that void will show up on the Voids Report (Chapter 4.4.R), all the products will be returned to the inventory room they were sold from and the Transaction will be removed from the sales history as if it never happened.

2) Refund
Chapter 3.3.B.2.B
A Refund can be processed for a customer and when the refund is completed the information for that refund can be found on the Sales Tickets Report (Chapter 4.4.P) as well as a few other reports. The user has the option to return the product into the inventory and when completed the dollar amount returned to the customer will be reflected in the Cash Close (Chapter 4.2.H) and will still be tracked as a sale made in BioTrackTHC.
G) Payout
This button allows users to preform payouts, meaning pulling money out of the register. Payouts are reflected on the Cash Close (Chapter 4.2.H) window so they can be used for vendor payments or even cash drops. Whenever a user preforms a payout they have to enter the dollar amount an input a reason for pulling that cash out of the register. Payouts can be viewed and even voided in the Payouts Tab (Chapter 3.3.E) and can also be viewed in the Payouts Report.

H) Cash Close
This feature will help facilities keep track of the money taken in by but tenders throughout the day of sales. Multiple cash drops can be done each day and cash drops can be set for the store or per terminal in the Cash Close Option (Chapter 4.1.O) if the user selects terminal select in those options they will be prompted to select which terminal they are closing out. Starting amount for cash closes can be set per terminal in the Terminal settings (Chapter 1.3.B). When doing a Cash Close users can view all the sales in that terminal, there is a Cash Close Notes Tab where users can add notes to the cash close and at the bottom it will show the collected amount for each Payment Method (Chapter 4.1.M), the user can even check off the methods of payments as counted by checking off the transaction in that area (to count debit/credit receipts). At this point users will count the cash and enter the information on the right hand side.

3) Marketing
Within BioTrackTHC users have the option to set up email and text message campaigns, these campaigns are free to send to the customer and free for the customer to receive them. All the users have to
do is be sure they capture the information on the Customer File (Chapter 4.2.A) such as email or phone number. Keep in mind when sending these campaigns they are sent from the email set up in the Email Settings, so if a customer replies to the users messages they will be sent to that email address. Furthermore, any Sprint phone numbers users should be sure to put a 1 before the number, otherwise they may not get the marketing campaigns via text message. Campaigns can also be viewed on the Campaign History Report (Chapter 4.4.M).

A) Setup

Marketing> Email Settings

To start users must input the email information that users would like to send the messages from. Email and Password are the information used to sign into that email. As far as the SMTP Address, SMTP Port and use TLS or use SSL, that information is found in the email provider itself usually under forwarding or imap/pop3 settings. After the information is retrieved from the email provider and the fields are entered the user can click Test Settings and BioTrackTHC will send an email to that email address confirming it was set up correctly. If tested successfully then the user will be ready to start sending email and text message campaigns.

B) Creating & Sending Campaigns

Marketing> Email Campaigns

Creating these campaigns is a 3 step process, one for each Tab in the Marketing window.

1) Campaigns

This tab is who is going to get sent the message and how is it going to be sent. First users can name the campaign whatever they would like, then they need to select how it’s going to be sent to the customers by email or by SMS (Text Message) and lastly the user can select who the Recipients will be by using the options available.

Some of these have more options to select from, for instance when selecting the Birthday Recipients the user will also be prompted for a birthday month so only users with a birthday in that month will get a message. When finished be sure to click Save to save the work and users can even delete campaigns using that button as well.
2) Content
This section is entering the message of what’s being sent to the customer through this campaign. First the user must select the campaign they would like to enter in a message for then they must select how it’s going to be sent either HTML, Text or Both. HTML requires code for BioTrackTHC to generate the campaign but this also allows users to input images, colored font and more and makes it an ideal tool for news letters or coupons, if HTML is being used and the user does not know how to write the code they can click on the blue writing that says “Online HTML Editor” that will take them to a website that can help them create the code very simply. Text is better for sending out SMS (text message) campaigns in BioTrackTHC and the user can write whatever the campaign needs to say in the box below Text Version. Users can also add variables to BioTrackTHC to customize the messages being sent out, When inserting the text to the left with the $ before the text BioTrackTHC will create a custom message to each person with that information for that customer. For example if the user put in something like “Hello $firstname, come in today for 10% off with this text” the message would add each customer’s name to each message and would look like “Hello Gregory, come in today for 10% off with this text” when received. When the user is finished they may Save the changes made or even discard the changes.

3) Mailer
This tab is where users can send out the campaigns they have created. To do so first a user must select the Campaign they would like to send then they have an option to send a test to themselves to be sure the message is what they wanted and they can send it. When clicking the Send Test or Send buttons the campaign will be sent into the Current campaigns box, in order to begin sending the campaign the user must select it in the current campaigns box and click Start Mailing Now and
BioTrackTHC will begin sending message to customers. The previous campaigns tab will show any campaign’s that have been sent in the past and how many of those were delivered or failed, the Campaign History Report will show who didn’t get the messages.

4) Customer & Sales Reports
   A) Average Wait Time by Day
      This report will generate the average wait time based on when the customer was checked in and checked out of BioTrackTHC and show for each day what the wait time is. This report needs to be run by date range but users can choose the day of the week or location. After the report is ran it will show each day of the week and the average wait time for each day.

   B) Check-in Report
      This report will show every person that was checked into BioTrackTHC and can be used as the check in/out log if the check-in tab is used to check in people that are visiting the facility. This report must be sorted by date but users can select a location. When this report is ran it will show the customer's name, Check-in Time, Check-out Time (When the sale was completed or the customer was checked out), Visit time, Location, Sale Completed (Did they buy anything), Removed by (if they didn’t buy anything), removed terminal.

   C) Customer History
      This report will show all of a sales and all the about each such as and loyalty points must look up the they wish to review by using the search box or they can search by MMJ Card number and lastly they can search by employee who made the customer file.
D) Customer List

This report will show a list of every customer in BioTrackTHC and all the information about each customer, even things like Loyalty Points can be seen on this report. User can run this report by Location (the customer file was made at), Member, Referral Method, Email (Existent), Birth Month and by Active (License). When this report is ran it will show the following fields for each customer; Last name, First name, Middle name, Birthdate, Phone, Address, City, State, Zip code, Member level, Email, Phone number, MMJ Card number, MMJ Card expiration, Email opt in, SMS opt in, Driver’s License, License Expiration, Location (Where the customer file was made), Generic fields (all the Custom Fields (Chapter 4.1.D.2) that were created for the customer files), Customer since, Member since, Number of visits, Spent to date, Referral, Plant count, Discount, Loyalty points and lastly the count (for a total account of customers at the bottom).

E) Customer MMJ Card Expiration
This report is to help Medical facilities contact or even just view when customer’s medical cards are going to expire. This report must be sorted by date range (of when licenses will expire) but users can also sort it by location or whether they are a member. When this report is ran it will show the following fields for each customer: Days (left for active license), Last name, First name, Middle name, Birthdate, Phone, Address, City, State, Zip code, Member level, Email, Phone number, MMJ Card number, MMJ Card expiration, Email opt in, SMS opt in, Driver’s License, License Expiration, Location (Where the customer file was made), Generic fields (all the Custom Fields (Chapter 4.1.D.2) that were created for the customer files), Customer since, Member since, Number of visits, Spent to date, Referral, Plant count, Discount, Loyalty points and lastly the count (for a total account of customers at the bottom).

F) New Customer Demographics
This report will help facilities see demographic information about any of the new customers they have. Users must sort this report by dates those new customers were made but can also sort by location, Top is the top however many results (if users only wanted to see the top result they could do top: 1). When ran the report will show all of the new customers between any Member Levels (Chapter 3.1.H.4) and then will break up those member levels by Zip, City and age so users can get an idea of where the new customers are coming from and what age demographic they cater too.

G) Product Purchases
This report will show a breakdown of all products sold to who a product was sold to or how buying items. This report must be users can also sort by location or report is run will show the given the users an idea of how often customers are sorted by date range but product. When this customer, product, spent, quantity, number of tickets.
H) Referrals
This report will show any referrals created either Static, by making the Referral Methods (Chapter 4.1.D.5), or by manually inputting the referral into the Customer File (Chapter 4.2.A). This report does need to be sorted by date range but also can be sorted by location. When ran the report will show each referral, referral count (how many referrals), amount spent (all customers totals for anyone with that referral) and the visit count (all customer visits with that referral).

<table>
<thead>
<tr>
<th>Referral</th>
<th>Referral count</th>
<th>Amount spent</th>
<th>Visit count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>3</td>
<td>17586.52</td>
<td>133</td>
</tr>
<tr>
<td>website</td>
<td>1</td>
<td>287.19</td>
<td>2</td>
</tr>
<tr>
<td>My friend Anthony</td>
<td>1</td>
<td>27248.84</td>
<td>179</td>
</tr>
</tbody>
</table>

5.00  45122.55  314.00

I) Sales Stats
This report will give the user a breakdown of each employee and the sales the employee did. This report needs to be sorted by date range but can also be sorted by Location. When ran this report will show; User, Sales count, Sales count as % (of the overall sales), Sales amount, Sales amount as % (of the overall sales), # of sales per hour, Sales per hour by amount, hours worked (if the time clock is being used), Hours worked as a % (of the overall hours recorded for all employees), Average ticket price, Average ticket weight, Total medicated weight sold (Marijuana), Total medicated weight sold as % (of overall weighable Marijuana sold), Total medicated non-weighable sold as quantity, Total medicated non-weighable sold as %, Total non-medicated sold as quantity (non-marijuana products)and Total non-medicated sold as %.

<table>
<thead>
<tr>
<th>User</th>
<th>Sales count</th>
<th>Sales count as %</th>
<th>Sales amount</th>
<th>Sales amount as %</th>
<th># sales per hour</th>
<th>Sales per hour by amount</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anthony</td>
<td>128</td>
<td>35.85</td>
<td>14171.03</td>
<td>29.40</td>
<td>0.67</td>
<td>74.03</td>
<td>191.42</td>
</tr>
<tr>
<td>Greg Walorski</td>
<td>181</td>
<td>50.70</td>
<td>28888.73</td>
<td>59.93</td>
<td>0.53</td>
<td>83.93</td>
<td>344.22</td>
</tr>
</tbody>
</table>

J) Cash Close
This report will show the Cash Closes (Chapter 4.2.H) done in BioTrackTHC. This report has to be run with a date range but users can also sort it by location or terminal (if Close by Terminal (Chapter 4.1.0) is on). When ran this report will show the location, user, date, opening (if set in Terminal settings (Chapter 1.3.B)), Expected (Based on sales), difference, Deposit, Terminal and Notes.

<table>
<thead>
<tr>
<th>Location</th>
<th>User</th>
<th>Date</th>
<th>Opening</th>
<th>Closing</th>
<th>Expected</th>
<th>Difference</th>
<th>Deposit</th>
<th>Terminal</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Grow&quot; Dispensary</td>
<td>Greg Walorski</td>
<td>05/12/2014</td>
<td>100.00</td>
<td>0.00</td>
<td>-400.00</td>
<td>-400.00</td>
<td>0.00</td>
<td>Server</td>
<td></td>
</tr>
<tr>
<td>&quot;Grow&quot; Dispensary</td>
<td>Greg Walorski</td>
<td>05/16/2014</td>
<td>0.00</td>
<td>404.22</td>
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K) Complex Sales Report

This report will show a lot of information generated from customer and wholesale transactions. Users must select a date range for this report but can also sort by Location, Terminal, Method (HTML preferred or Spreadsheet) and Cost, Inventory then product or product then inventory. When ran, this report will start by breaking up all the sales by the method of payments accepted between both retail and wholesale then it will add up both and show totals at the bottom. Then it will break up the retail sales to show quantities and amounts for medicated and weighable, medicated but non-weighable, Non-medicated and non-weighable, Gross product sales, Less discounts, Total gross product sales. After that the report will show wholesale transactions and a summary with quantity and amount for Inbound and outbound trade as well as sales and purchases. Then it will show any refunds and payouts during that time period with quantity and amount. It will again show the sales totals but will show tax rates applied to retail and wholesale. Cash close information will populate next followed by a tickets box that will show Total number of tickets, Number of voided tickets, Number of refunded tickets, single item tickets, multiple item tickets and average price with totals. It will also show new and returning customers. Then it will show the sales breakdown by category, for each category it will show; Sales, Quantity, Gross Sales, discount, Net sales, Cost, Profit, Profit %, % of
sales by quantity, % of sales by amount, average price per unit, average profit per unit. Then the Complex Sales Report will show a detailed sales breakdown that will show each category with all the products sold out of that category with the columns showing; Sales, Quantity, Gross sales, Discount, Net sales, Cost, Profit, Profit %, Common Price Point, Average Price Per Unit, % of sales by quantity, % of sales by amount and % of profit. After doing this for the retail section it will repeat the process with the location transfers and wholesale transactions and breaking up the categories then showing a breakdown of each product and the vendor that product was bought or sold to or from, it will break up the categories and products by; In Weight (usable weight or count), In Quantity (number of inbound transactions), In Cost (total cost), Out weight (usable weight or count), Out Quantity (number of outbound transactions), Out Revenue, Profit (Cost-out revenue), Profit percentage.

L) Payments
This report will show all the payments made to the location on the retail level usually to see when an account was paid or to view at a glance if any refunds had been processed. This report must be run by a date range but user can sort by Location, Customer name (Show), Method (of payment), Terminal, Grouping (by date) and Display (Positive, Negative or All). When ran it will show the customer’s name, payment method, amount, Date and the user.

M) Sales Report
This report will show all of the retail transaction totals during a specific time. The user has to select the date range but can sort by location. They can also choose to show the customer’s name, Tax exempt sales or payment differences. When this report is run it will show Location, Name (of customer), Price, Tax, Total Price, Total Paid, Terminal, User and Date.
N) Sales Tickets
This report will show all of the transactions with the detailed information for each item. The date range is required but the user can sort by location, employee, customer name (Show), Terminal, or Line item (show transactions as line items).
When the user runs this report they can see all the transactions with time and date, Item sold, Customer, Quantity, Subtotal, Tax, Total and Scale (Manual or integrated).

O) Sales Trends
This report will give the user information over a period of time and depending how the user sorts the report they can get a variety of information. The user has to select a date range and can select a location then they can decide how the information will be shown in sort by, by each date, week or month. Items can be grouped by location or searched by terminal, product or category. Sum is the key element in this report using this tool in this report will give the user a variety of information, it can be sorted by; Sales totals, Sales total by Product, Sales total by Category, Sales totals by Inventory Type, Quantity Totals By product, Quantity totals by Category, Quantity totals by Inventory Type, Weight Totals by Product, Weight Totals by Category and Weight Totals by Inventory Type. Depending on how the sum is sorted the report will show the totals for each different object selected to see.
P) Voided Tickets
This report will show any Voids (Chapter 3.3.B.2.b) done for any retail sales in BioTrackTHC. This report must be done by date but can also be sorted by Location, Employee or Customer name. When ran it will show all the voided tickets under Time, Customer, Tax, Subtotal, Total, Employee, Reason, Item, Quantity, Price, Tax, Total and there is a total at the bottom for the Total Voids Amounts.

Q) Z-Out
This report will show users the transaction summary for a time period of sales, usually a day. Users use this for the end of the day transaction report, it must be set up by date range but can be sorted by location or terminal. When ran this report will show a summary and amounts for each object in the summary; Retail Taxable, Retail Non-Taxable, Retail Tax Collected, Gross Sales, Total Tax, Total, Retail Cash In, Total Cash In, Cash Remaining. Then if a Close Cash (Chapter 4.2.H) was done it will show each terminals totals with; Terminal, Cash opening, Cash expected, Cash counted, Difference, Deposit amount and at the bottom a Retail Transaction count.
Chapter 6: System Variables
Administration>Advanced>System Variables

1) Low Inventory
This Setting is to change the quantity of when inventory items will appear orange in the menu in the Customer Tab indicating that item is low in the inventory.

2) PO Include Batch #
This feature will turn on the Batch field on the Inventory Details (Chapter 3.2.A) window that allows users to input a batch number of their choice. These Batch numbers usually populate when using the New Inventory (Chapter 3.2.G) feature and can be placed on Customer and Inventory Labels (Chapter 3.1.J) by using the Custom Batch variable.

3) Sales Time Specify
This allows users to ring up a sale for any time or date, useful if a sale was rung up incorrectly and needs to be fixed. This variable can be turned on by making sure the numerical value is at 1, when at 0 it’s off. When on, after a sale is completed using the Pay (Chapter 4.2.E.8) window, the user will be prompted to enter the date and time of the sale before completing the sale.

4) Display Inactive users
When this variable is set from 0, off, to 1 it will show users in the Modify Users (Chapter 1.1.A.2) window that has been unchecked as active users.

5) MMJ Card Expiration
This setting is to warn the budtenders of how many days the customer has left on their medical license upon Checking-in (Chapter 4.2.B). Here users can change how many days until the warning remaining before the message will show.

6) On The Fly Pricing
When set to 0 this feature is off but when set to 1 this feature allows the budtender to change the price per gram when clicking on the price points field in the Dispense Product (Chapter 4.2.D.1) window.

7) Whole Ticket Discounts
This setting can eliminate whole ticket discount from BioTrackTHC for accurate report to metric because they do not accept whole ticket discounts. By default its set to 1 that allows whole ticket discounts but when set to 0 BioTrackTHC will make the user apply each discount to each line item so the MITS Report (Chapter 4.4.K) will be accurate.

8) Usable Non-weighable Required
This will require that the usable amount for each product sold. If a usable amount is not assigned to a non-weighable marijuana product BioTrackTHC will warn the user that the item they are selling does not have a usable amount and states would the user likes to add it now, by clicking yes the user will be brought to the Inventory Details (Chapter 3.2.A) window so they can enter the usable amount into the usable field when
this is completed the user may proceed with the sale. This will make sure the facility always tracks usable amount and the sales limit tool will not allow users to over dispense in BioTrackTHC.

**Shortcut Index**

**Growhouse Shortcuts**

This button will allow users to create a *New Plant* (*Chapter 2.2.C*) in BioTrackTHC. From the *New Plant* window users will create plant barcodes, assign MITS IDs and even assign the mother plant information to clones so BioTrackTHC can create the *Mother Yields Report* (*Chapter 2.3.A*).

This button will open the *Strains* (*Chapter 2.1.H*) window so users can input new strains or edit existing strains in BioTrackTHC. Users can also modify *Strain Notes* that show on the *Modify Plant* (*Chapter 2.2.D.1.b*) window and the *Inventory Details* (*Chapter 3.2.A.1.b*) window.

This button allows users to input *Container* (*Chapter 1.J*) weights into BioTrackTHC, using the container weights will allow users to keep product in the container when weighing it, if pre-weighed users will not need to pour out the product then weight it and put it back in they can just select the container and the weight will be negated from the total just showing the weight for that item.

This button allows users to use the *Create Batch* (*Chapter 2.2.N*) feature where users can record weight that was collected during growing but can also be used to re-weigh any products that user set to *Batch Later* (*Chapter 2.1.F.1*)and discard or send them to the waste report.

This button allows users to use the *Plant Audit* (*Chapter 2.2.L*) feature to count the plants they have either by location or room. When completed users can either remove the plants that were not scanned or send them to a different room.

**Inventory Shortcuts**

This button will bring users to the *New Inventory* (*Chapter 3.2.G*) window where they can create new inventory either because of a wholesale transaction or a pre-existing product.

This button allows users to *Transfer Inventory* (*Chapter 3.2.H*). This can be to a wholesaler as a sale but can also be used to transfer inventory to and from locations in the database.
This button is where users will input or modify information about all of the Products (Chapter 3.1.G) they intend to have in the inventory. Keep in mind this is not where quantity is entered this is strictly product information.

This button will help users keep the inventory organized by Product Category (Chapter 3.1.F). Each Product (Chapter 3.1.G) must be assigned a category to be created. These categories can be used for Price Points (Chapter 3.1.H.2), can be browsed by budtenders in the Menu (Chapter 4.2.C.3) and is another way to search reports.

This button is used to enter in all of the Tax Categories (Chapter 3.1.B) or tax rates a facility might charge to a wholesaler or to customers on the retail level. If broken up the Tax Breakdown Report (Chapter 3.4.M) will show how much was paid to each rate during any time period selected.

This button allows users to input Container (Chapter 1.J) weights into BioTrackTHC, using the container weights will allow users to keep product in the container when weighing it, if pre-weighed users will not need to pour out the product then weight it and put it back in they can just select the container and the weight will be negated from the total just showing the weight for that item.

This button is so users can assign Price Points (Chapter 3.1.H.2) to Product Categories (Chapter 3.1.F) to have a pricing structure set for any products assigned to that category.

This button will open the Strains (Chapter 3.1.E) window so users can input new strains or edit existing strains in BioTrackTHC. Users can also modify Strain Notes that show on the Modify Plant (Chapter 2.2.D.1.b) window and the Inventory Details (Chapter 3.2.A.1.b) window.

This button will open the Inventory Audit (Chapter 3.2.F) window so users can perform an audit. When doing so it will open an audit window for the room that the user is in and users can break up audits by categories or even run audits as blind audits.

This button will allow users to add, modify and delete Vendors (Chapter 3.1.C) and users can even store demographic information, notes and can even scan documents into the vendor file.

This button is used for Inventory Grading (Chapter 3.1.H.3) where grades can be assigned to batches of products to increase or decrease the price of the product based on the quality.

This button will allow users to add, modify and delete Laboratories (Chapter 3.1.C) and users can even store demographic information, notes and can even scan documents into the laboratories file.

**Customer Shortcuts**
These buttons are to view, add, modify or check-in (Chapter 4.2.B) customers using the Customer File (Chapter 4.2.A).

This button is where users will input or modify information about all of the Products (Chapter 3.1.G) they intend to have in the inventory. Keep in mind this is not where quantity is entered this is strictly product information.

This button allows users to add, edit and delete Discount Programs (Chapter 4.1.L) so budtenders can apply them to a transaction.

This button will allow users to perform a Payout (Chapter 4.2.G) and take cash from the register. This Payout will show on the Cash Close (Chapter 4.2.H).

This button will start a Cash Close (Chapter 4.2.H) that will reset the register to the opening amount. Users can view a Cash Close Report (Chapter 4.4.L) to view the details.

This button will print a Customer Label (Chapter 3.1.J) for any product highlighted in the sales screen.

This button will remove one item after selecting the item.

This button will remove all items from the sales screen.

This button will bring the user back to the Dispense Products (Chapter 4.2.D) window so they can edit a selected items quantity or weight.

This button is the On The Fly Discount (Chapter 4.2.E.5) button that will allow a user to apply a discount to a transaction by dollar amount or percentage.

This button will Save (Chapter 4.2.E.6) the transaction in the Check-in (Chapter 4.2.B) tab.

This item will allow users to apply Loyalty Points (Chapter 4.1.K) to a transaction.

This button allows users to finish a transaction by inputting the Payment Method (Chapter 4.1.M) into the Pay (Chapter 4.2.E.8)
Our Story

- **Knox Medical** is a licensed medical cannabis cultivator, processor and dispenser of CBD and medicinal cannabis products in the State of Florida and Puerto Rico.

- Our organization was born from the Engagement of **Knox Nursery**, a second generation family-owned nursery based in Central Florida and Cansortium Holdings, a business and finance expert in the medical cannabis industry.

- Together, our companies built an accomplished team of healthcare, legal, government affairs, investor relations, public affairs, real estate, retail and horticultural experts.
Our Mission

To compassionately provide qualified patients access to the highest level of medicinal cannabis in an unrivaled, professional healthcare environment. Patient care always comes first at **Knox Medical** and our standards, practices, and performance is unmatched.
Our Vision

- To be an industry leader in medicinal cannabis.
- To be the most resourceful and educated team of medicinal cannabis experts.
- To identify and close new sales opportunities through physician relationships.
- To create brand loyalty within the patient and physician communities.
- To become less transaction-oriented and more relationship driven.
Our Executive Leadership

- **José J. Hidalgo** is the **Chief Executive Officer** and Founder of Knox Medical. Prior to Knox, José focused his career as a business and finance expert in the medical cannabis industry with an extensive background in real estate development and investments.

- **Bruce Knox** is the president of Knox Nursery, Inc. and the **Chief Operating Officer** and Founder of Knox Medical. Bruce is the executive leader a second generation family owned business that encompasses over 23 acres of production in the heart of Central Florida. Knox utilizes innovated technology solutions to support quality outcomes and tracking mechanisms from cultivation to distribution.

- **Henry Batievsky** is the **Chief Financial Officer** and Cofounder of Knox Medical. Prior to Knox, Henry has enjoyed a successful career as a tax accountant, real estate developer and entrepreneur. Henry has a Bachelor of Science in Economics from University of Pennsylvania and his Juris Doctorate from University of California-Los Angeles.
Medical and Chemical Engineering Team

- **Orlando Florete, MD** is the **Chief Medical Officer** of Knox Medical. He is a board certified physician in Anesthesia and Pain Management. Dr. Florete is responsible for supervising our medical advisors and cannabis consulting experts.

- **Alex Karol** is the **Lead Chemical Engineer** for Knox Medical. He holds bachelors degrees in Biomedical Engineering and Biopsychology from Tufts University. Prior to Knox, Alex focused on research in immunology in the pharmaceutical industries.
Why Knox Medical

- **Knox Medical** is committed to supporting patients, physicians, and caregivers at every step of the treatment process. Patient care always comes first at **Knox Medical**. Our quality, standards, practices, performance, and team of associates are unmatched.

- **Knox** has invested in the latest technology to support our production of medicinal cannabis products. Our extraction equipment was designed by retired NASA engineers and our greenhouse cultivation area is supported by radiofrequency identification technology. This allows us to collect data scans from an individual unit to the entire production environment.

- **Knox Medical** received the highest statewide score from the Florida Department Health in its application to become a medical cannabis cultivator, processor, and dispenser of CBD and medicinal cannabis products.

- **Knox Medical** Puerto Rico received pre qualification for cultivation, manufacturing and dispensing medical cannabis and related products.

- PR phase 1 is design to start cultivating in nine state of the art containers and will supply medicine for five dispensaries in highly populated communities areas.

- **Knox Medical** is committed to serving and supporting families in our community. At **Knox**, we recognize that some of our patients need a little more help than others. As a result, **Knox** has established a fund to support patients that cannot afford their medicinal cannabis. With guidance from our community action agencies, we are proud to provide reduced cost medicinal cannabis for our patients in need.
Knox Medical Products

- **Low THC:**
  - **Alcor:** Treat epilepsy and other disorders
  - **Regor:** Chronic pain and stress, high CBD concentration

- **Moderate & High THC:**
  - **Kastor:** Our highest THC concentrations for maximum pain relief
  - **Polaris:** First product many patients are prescribed when starting a medical cannabis regimen. Parkinson’s patients find to be highly effective in reducing muscle tremors and nerve pain
  - **Subra:** Fast-acting is preferred among patients for relief from stress, pain, and depression
**Odra:** Migraine sufferers will appreciate relief from intense symptoms while also experiencing a relaxed sense of euphoria.

**Baldor:** Designed product for daytime use. Relieves pain throughout the day, leaving patients feeling energized without causing drowsiness or lethargy.

**Gemma:** Most powerful medical cannabis product, delivers high doses of THC to reduce nausea and increase appetite by those undergoing chemotherapy.

**Shira:** Well-suited to the first-time patient in need of relief from chronic arthritis pain, also has been shown to be effective for migraine and headaches suffers without inducing sedation of drowsiness.
Knox Medical Dispensaries

- **Knox Medical** dispensaries are an extension of our corporate brand and products. Our goal is to provide a patient-centric environment where each person receives 1:1 service for their medicinal cannabis needs.

- Product offerings and detailed education on our proprietary products are essential discussions during each patient encounter.

- Patient education on how to administer their medication via vape, tincture or capsules will be provided by our associates.
Target Markets

- Florida communities with a minimum of 500,000 residents
  - South Florida (Miami Dade, Broward, Palm Beach)
  - Central Florida (Brevard, Hillsborough, Lee, Pasco, Pinellas, Polk, Orange and Seminole)
  - North Florida (Alachua, Duval, Leon, Volusia)
- Puerto Rico communities predominately in San Juan and Bayamón
• To be an industry leader for medicinal cannabis in Florida and Puerto Rico

• To open statewide cannabis dispensaries that will allow us to expedite product availability and delivery to our patients

• To provide our physicians with unlimited access to clinical outcome data and industry standards for medication dosage
Working Towards Our Goals

- Immediately focus on cities that neighbor our dispensaries;
- Focus on densely populated, high-income cities with large physician and academic medical presence;
- Focus on disease state physicians and work within their referral patterns and source;
- Work with our chief medical advisors to engage in discussions regarding comorbidities and other disease states that impact the primary qualifying conditions for High CBD and medicinal cannabis;
- Create feeder markets for the Qualified Ordering Physicians and build support their system to help their practices grow.
Physician Engagement Strategy

- Developing our own network of Qualified Ordering Physicians is key to our sales goals and overall corporate success.

- As a new market to medical cannabis, Florida and Puerto Rico provide unlimited opportunities for Knox Medical to excel as an industry leader to the physician and patient communities.

- We can only align with physicians that maintain the highest practice standards and put patient care first.
Physician Engagement Strategy

- Invitations to our Dispensary grand openings
- Tours of our manufacturing facilities
- Develop physician advisory panels and patient education seminars hosted by Knox Medical on the physicians behalf
- Create physician driven marketing for qualified patients (goal is to ease financial and administration burden of the physicians outreach costs)
- Co-branding on billboards, bus benches near VIP physicians
- Advertising in media targeted towards caregivers (condition specific networks, e.g. Today's Caregiver in Florida or Care Givers de Puerto Rico)
March 20, 2017

Mr. Jose Hildalgo  
Chief Executive Officer  
KNOX Medical  
1150 First Avenue, Suite 551  
King of Prussia, PA 19480

Dear Mr. Hildalgo

The purpose of this letter is to outline the conditions under which Mid Penn Bank (the “Bank”) would be willing and able to establish an account or accounts for Consortium, PA dba Knox Medical (the “Depositor”). As a condition of opening, Mid Penn will require the following:

- Attestation by the Depositor that all monies deposited into the account are capital investments contributed by third-party investors and were not generated by (i) the Depositor’s operations in Pennsylvania or any other state, or (ii) the operations of any marijuana-related business.

- Acknowledgement by the Depositor that the Bank is willing to maintain the account only so long as the Depositor completes the application process with the Pennsylvania Department of Health. Should the Depositor successfully obtain approval to perform any marijuana-related business activity, Mid Penn reserves the right, in its sole and absolute discretion, to close any and all accounts within 30 days of the receipt of that approval.

- Receipt of normal and customary Customer Due Diligence information as required by the Bank at the time of account opening.

Please feel free to call me directly with any questions regarding the above-detailed conditions. I can be reached at [DOH REDACTED]

Sincerely,

[Signature]
Zachary Miller, CAMS-FCI  
Vice President / BSA Officer

[DOH REDACTED]  
Member FDIC  
midpennbank.com
November 23rd, 2015

Knox Nursery, Inc

DOH REDACTED

Re: Low-THC Cannabis Dispensing Organization Application

Dear Applicant:

I am pleased to inform you that Knox Nursery, Inc.'s Application to become a Low-THC Cannabis Dispensing Organization for the Central region has been substantively reviewed, evaluated, and scored by a panel of evaluators according to the requirements of Section 381.986, Florida Statutes and Chapter 64-4, of the Florida Administrative Code. As your application received the highest score for the Central region, your application is granted. Knox Nursery, Inc. is approved as the dispensing organization for the Central region of Florida.

Knox Nursery, Inc. has 10 business days to post a $5 million performance bond in accordance with Rule 64-4.002(5)(e), of the Florida Administrative Code. The original bond, payable to the Florida Department of Health, must be received by the Department no later than 5:00 PM EST on December 9th, 2015. If the performance bond is canceled and Knox Nursery, Inc. fails to file a new bond with the Department in the required amount on or before the effective date of cancellation, Knox Nursery, Inc.'s approval shall be revoked.

Knox Nursery, Inc. must notify the Department that it is prepared to be inspected and seek authorization to begin cultivation, processing, and dispensing. The following deadlines, as outlined in Rule 64-4.005, of the Florida Administrative Code, apply.

Cultivation

Knox Nursery, Inc. has 75 days from this approval to request Cultivation Authorization. No less than 30 calendar days prior to the initial cultivation of low-THC cannabis Knox Nursery, Inc. shall notify the Department that it is ready to begin cultivation, is in compliance with Section 381.986, F.S., and Chapter 64-4, of the Florida Administrative Code, and is seeking Cultivation Authorization. Failure to meet the deadline to seek Cultivation Authority may result in the revocation of the Department's approval. Please note, no low-THC cannabis plant source material may be present in any Dispensing Organization facility prior to Cultivation Authorization.
Processing

No less than 10 calendar days prior to the initial processing of low-THC cannabis, Knox Nursery, Inc. must notify the Department that it is ready to begin processing, is in compliance with Section 381.986, F.S., and Chapter 64-4, of the Florida Administrative Code, and is seeking Processing Authorization.

Dispensing

Knox Nursery, Inc. must begin dispensing derivative product within 210 calendar days of being granted cultivation authorization. No less than 10 calendar days prior to the initial dispensing of derivative product, Knox Nursery, Inc. must notify the Department that it is ready to begin dispensing, is in compliance with Section 381.986, F.S., and Chapter 64-4, of the Florida Administrative Code, and is seeking Dispensing Authorization. Failure to meet the deadline to begin dispensing may result in the revocation of the Department’s approval.

Finally, submission of an application for Dispensing Organization approval constitutes permission for entry by the Department at any reasonable time, into any Dispensing Organization facility to inspect any portion of the facility; review the records required pursuant to Section 381.986, F.S., or Chapter 64-4, of the Florida Administrative Code; and identify samples of any low-THC cannabis or Derivative Product for laboratory analysis, the results of which shall be forwarded to the Department.

Once again, congratulations on receiving approval to become the Low-THC Dispensing Organization for Central region. Should you have any questions about this approval, please contact the Florida Department of Health, Office of Compassionate Use.

Sincerely,

[Signature]

Dr. Celeste Philip
Deputy Secretary for Health

CB/cc
Cc: Office of the General Counsel
NOTICE OF RIGHTS

This notice is agency action for purposes of section 120.569, Florida Statutes. A party whose substantial interest is affected by this action may petition for an administrative hearing pursuant to sections 120.569 and 120.57, Florida Statutes. A petition must be filed in writing and must be received by the Agency Clerk within twenty-one (21) days from receipt of this notice. The petition may be mailed to the Agency Clerk, Department of Health, 4052 Bald Cypress Way, BIN #A-02, Tallahassee, FL 32399-1703; hand delivered to the Agency Clerk, Department of Health, 2585 Merchants Row Blvd., Prather Building, Suite 110, Tallahassee, FL; or sent by facsimile to (850) 413-8743. Such petition must be filed in conformance with Florida Administrative Code Rules 28-106.201 or 28-106.301, as applicable.

Mediation is not available.

Failure to file a petition within 21 days shall constitute a waiver of the right to a hearing on this agency action.
NOTIFICACIÓN DE PRECUALIFICACIÓN DE LICENCIA PARA ESTABLECIMIENTO DE CANNABIS MEDICINAL

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Direccion Postal: DOH REDACTED

Dirección del establecimiento: DOH REDACTED

I. CONDICIONES:

Esta Notificación de Pre-cualificación de Licencia para Establecimiento de Cannabis Medicinal se expide al amparo del Reglamento Núm. 8766 y la Orden Administrativa Núm. 352. Esta Pre-cualificación notifica el cumplimiento parcial de los requisitos necesarios para la expedición de las Licencias Establecimiento enumeradas en el epígrafe de este documento conforme al Reglamento Núm. 8766. Esta Autorización podrá ser revocada de usted no cumplir con todos los requisitos establecidos en el Reglamento Núm. 8766 y el Reglamento Núm. 153, incluyendo un resultado negativo de la revisión de antecedentes penales efectuado por la Policía de Puerto Rico. Se le informa que para el otorgamiento de cada una de las Licencias de Establecimiento de Cannabis Medicinal para las cuales usted ha sido pre-cualificado será necesario que usted cumpla con las condiciones señaladas a continuación:

1. Someta la Solicitud de Licencia correspondiente al establecimiento solicitado.
2. Solicite, se someta, y apruebe una inspección por la Oficina de Sustancias Controladas y Cannabis Medicinal.
3. Someta Licencia Sanitaria para el establecimiento solicitado.
4. Someta endoso de bomberos para el establecimiento solicitado.
5. Presente un informe de Estándares de Procedimientos Operacionales y copia de todos los manuales de protocolos, informe, hoja de instrucciones y procedimientos que desarrolle para el funcionamiento de su establecimiento.
6. Evidencia de pago total del arancel de solicitud de licencia.
8. Someta el Permiso de Uso.
9. Cualquier otra información que el Departamento de Salud requiera que considere necesaria o relevante para determinar la idoneidad del solicitante para obtener la Licencia:

II. ADVERTENCIAS:

Esta notificación no constituye una Licencia para Establecimiento de Cannabis Medicinal ni un derecho propietario o expectativa sobre la licencia solicitada. La aprobación final de su solicitud y la correspondiente expedición de la licencia solicitada está condicionada al cumplimiento con todas las disposiciones y requisitos del Reglamento Núm. 8766, incluyendo un resultado negativo de la revisión de antecedentes penales efectuado por la Policía de Puerto Rico. El Departamento de Salud se reserva el derecho de requerir información adicional que considere relevante para determinar la obtención de una licencia.

FECHA DE EXPEDICIÓN: 10/18/16

Cordialmente,

Dra. Ana Del C. Ríus Armendáriz
Secretaria de Salud

Departamento de Salud
Oficina de Sustancias Controladas y Cannabis Medicinal
PO Box 70184 San Juan, PR 00936-8184
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NOTIFICACIÓN DE PRECUALIFICACIÓN DE LICENCIA PARA ESTABLECIMIENTO DE CANNABIS MEDICINAL

Nombre de la Corporación / Solicitante: Consortium Puerto Rico, LLC

Dueño: Roberto Pedro Morales y Jose Javier Hidalgo

Tipo de Registro: Dispensario

Núm. de Solicitud: 2016-07-0017

Dirección Postal: DOH REDACTED

Dirección del establecimiento: DOH REDACTED

I. CONDICIONES:

Esta Notificación de Pre-cualificación de Licencia para Establecimiento de Cannabis Medicinal se expide al amparo del Reglamento Núm. 8766 y la Orden Administrativa Núm. 352. Esta Pre-cualificación notifica el cumplimiento parcial de los requisitos necesarios para la expedición de las Licencias Establecimiento enumeradas en el epígrafe de este documento conforme al Reglamento Núm. 8766. Esta Autorización podrá ser revocada de usted no cumplir con todos los requisitos establecidos en el Reglamento Núm. 8766 y el Reglamento Núm. 153, incluyendo un resultado negativo de la revisión de antecedentes penales efectuado por la Policía de Puerto Rico. Se le informa que para el otorgamiento de cada una de las Licencias de Establecimiento de Cannabis Medicinal para las cuales usted ha sido pre-cualificado será necesario que usted cumpla con las condiciones señaladas a continuación:

1. Someta la Solicitud de Licencia correspondiente al establecimiento solicitado.
2. Solicite, se someta, y apruebe una inspección por la Oficina de Sustancias Controladas y Cannabis Medicinal.
3. Someta Licencia Sanitaria para el establecimiento solicitado.
4. Someta endoso de bomberos para el establecimiento solicitado.
5. Evidencia de cuenta activada y funcional del Sistema de Rastreo e Inventario.
6. Presente un informe de Estándares de Procedimientos Operacionales y copia de todos los manuales de protocolos, informe, hoja de instrucciones y procedimientos que desarrolle para el funcionamiento de su establecimiento.
7. Evidencia de pago total del arancel de solicitud de licencia.
8. Someta el Permiso de Uso.
9. Cualquier otra información que el Departamento de Salud requiera que considere necesaria o relevante para determinar la idoneidad del solicitante para obtener la Licencia:

II. ADVERTENCIAS:

Esta notificación no constituye una Licencia para Establecimiento de Cannabis Medicinal ni un derecho propietario o expectativa sobre la licencia solicitada. La aprobación final de su solicitud y la correspondiente expedición de la licencia solicitada está condicionada al cumplimiento con todas las disposiciones y requisitos del Reglamento Núm. 8766. El Departamento de Salud se reserva el derecho de requerir información adicional que considere necesaria o relevante para determinar la obtención de una licencia.

FECHA DE EXPEDICIÓN: 10/24/16

Cordialmente,

Dra. Ana Del C. Rius Armendáriz
Secretaria de Salud
Knox Nursery delivers area’s first medical marijuana

News Source: The Orange Observer

Date: 12/7/16

Winter Garden's Knox Nursery, founded in 1962, turned over a new leaf in May after it obtained a license to grow and sell low-THC marijuana for medical use.

The first home deliveries that reached patients on Friday, Dec. 9, were grown and cultivated in another temporary facility, but starting in mid-January, the nursery will be using 30,000 square feet of greenhouse space located at 940 Avalon Road for its new crops.

The trio leading the nursery's new venture into the highly-regulated business of medical cannabis are Knox Nursery CEO Bruce Knox, Knox Medical CEO Jose Hidalgo and lead chemical engineer Alex Karol. Knox Medical is a subsidiary company they developed to run their medical cannabis business.

"This is a very, very exciting day for us," Hidalgo said. Everything we've done is with the patients in mind and with those who've been suffering and waiting for this day."

On Wednesday, Dec. 7, the company executives gave press-only tours of their extraction room and laboratory where marijuana is grounded into a fine powdery substance in preparation for an oil extraction process. That oil is then rigorously tested for impurities before it is converted into either drops, pills or inserted in vape pens for patients to use.

The family-owned nursery has traditionally grown a variety of flowers for Orlando's theme parks, but the decision to cultivate medical pot for ailing patients came about two years ago when the state passed the Compassionate Medical Cannabis Act of 2014. The law allows marijuana extracts low in euphoria-inducing THC, short for tetrahydrocannabinol, and high in CBD, short for cannabidiol, to be prescribed to eligible patients for medical relief.
"For me, there's a personal side to this," Knox shared. "I have two family members with epilepsy. So that is one of the reasons that I wanted to go down this path to begin with."

According to a press release, the company will also open five dispensaries in Gainesville, Jacksonville, Lake Worth and Tallahassee in early 2017.
Winter Garden dispensary prepares for medical marijuana expansion

News Source: Central Florida News 13
Date: 12/7/16

On Wednesday, the Winter Garden company opened its doors to journalists, showing off their state-of-the-art lab, for the first time.

Knox Medical will deliver the cannabis directly to patients in need, in the form of drops or vaporizing cartridges.

In their new lab, plants are ground into a fine powder substance, then packed into a CO2 extraction system, where oil is extracted. That oil can be reintroduced into other strains or medications. Engineers then test the cannabis to make sure it meets state standards.

“To see everything come together, it took a lot of teamwork, everyone,” said Alex Karol, lead chemical engineer at Knox Medical.

Karol, who studied biomedical engineering, started as a consultant at the company. He went on to design every facet of the lab.

“Science has always been a part of my life,” he said, pointing out each machine in the sterile space and its use in the process. “Sometimes I have to pinch myself and I can’t believe I’m doing this, especially in Central Florida.”

There are thousands of strains of marijuana, but Knox is focused on nine, according to Karol.

“I have dedicated 100 percent of my time to this the last two years. This is all I do,” said Jose Hidalgo, Knox’s CEO. “My vision of this is that this is a whole new sector of the economy. And I think that’s why this is so exciting.”

His business partner, Bruce Knox, agrees. He called the facility the "culmination of a dream and vision," that they’ve had for the past two and half years.
In May 2014, Florida State legislature passed the Charlotte’s Web bill, and began looking for businesses to license to grow medical marijuana.

According to Knox, the state wanted Florida businesses in existence for 30 or more years and who grew more than 400,000 plants to be in charge of the budding process.

The Knox family farm has been in Winter Garden for decades and applied for a license in July 2015.

Months later, the state granted them -- and five other locations -- a coveted license to grow medical marijuana.

Knox Medical has been growing the high THC-strain for the past year, meant for people suffering from a condition considered to be terminal. They’re opening dispensaries first in downtown Orlando and Gainesville, then three other cities: Jacksonville, Lake Worth and Tallahassee.

“I think people have to get out of their mind that this is an illicit drug that we’re distributing. It is not," said Knox, who added his personal connection is two family members who suffer from epilepsy. "This is a medicine to help patients in need."

Karol, too, said the acceptance of medical marijuana into mainstream culture is important to him.

“This is very personal to me. My mother is somebody who is struggling with early onset Alzheimer's," said Karol. “I hope that we can cure as many people as possible. I really think this industry is going to revolutionize the health care industry."

With the November election's passage of Amendment 2, conditions were expanded for who can receive medical marijuana. Knox said they may start distributing to those patients on January 3.

Owners would not release a price for their products, but said their cannabis costs an at-market price of 17 cents a milligram.
Winter Garden medical marijuana distribution center opens
Knox Medical fourth group to receive authorization in Florida

News Source: WKMG News 6 Orlando
Date: 12/7/16

TALLAHASSEE, Fla. - Knox Medical is the fourth organization to receive authorization to distribute low-THC medical marijuana in the state of Florida.

The facility opened for distribution on Wednesday morning.

Florida's Department of Health gave the Winter Garden-based organization authorization over the weekend. Knox Medical spokesman Adam Sharon said the group expects to begin in-home delivery to patients by Friday.

Knox's approval is the first since Amendment 2 was passed overwhelmingly by voters last month.

The amendment broadened access to pot beyond the limited therapeutic uses approved by the state legislature two years ago.

Department of Health spokeswoman Mara Gambineri said 208 physicians and 1,150 patients are currently in the state registry for ordering and using medical marijuana.

News 6 reporter Sachell Saunders went on a tour of the new business on Wednesday.

The lab will be used to blend cannabis, then THC oils are extracted, tested, and sent off for packaging. Knox will sell the cannabis in oil drop form or with a vapor pen for varying prices based on income.

Patients would first need approval from doctor's who've gone through state training.
"This is a new world, not quite pharmaceutical, and not quite pot. It's a new space in medicine and it's an exciting time for sure," Knox founder Jose Hidalgo said.

Knox plans to open dispensaries in both downtown Orlando and Gainesville to distribute the medication. For now, orders will be delivered by mail. The first orders go out Dec. 9.
Medical Marijuana dispensary set to open in Orlando

News Source: WOFL Fox 35 Orlando

Date: 12/7/16

In Ivanhoe Village, a medical marijuana dispensary will soon be open for business. The owner says it's two years in the making.

"It is amazing, it's been a roller coaster ride that's been full of ups and downs and twists and turns, but we're finally to the point where we got our dispensing approval."

Among the beautiful flowers at Knox Nursery, another business is sprouting nearby on the same property. "We have invested a lot of money to create the highest quality of medication. Our testing facilities, which you'll see tomorrow, are world class."

Co-Founder Bruce Knox says his family has owned this Winter Garden nursery for 55 years.

Getting approval to dispense low-THC and medical cannabis from the Department of Health wasn't just about business.

"Personally I have two family members who have epilepsy so I have seen seizures and what that is like, so not only that aspect of it, but just the ability to help people. I think everybody has seen family members or friends with cancer."

Five dispensaries are being built in Orlando, Gainesville, Jacksonville, Tallahassee and Lake Worth. Medical pot will also be delivered to patient’s homes starting Friday both low and full THC will be available in certain areas.

It's the full THC that gets a person high.

And Knox says he has to dispense in other locations because the city of Winter Garden doesn't allow it here.

"The city of Winter Garden has a dispensing moratorium, which a lot of jurisdictions have put them in place to prevent it."
Knox Media Report

The Orlando location will only sell the low THC because of a moratorium on the full THC until July. We went next door to the White Wolf Café and got the owner's reaction.

Michael Hennessey says, "They bring new people to the area, so that can't be a bad thing," Michael Hennessey said, who hopes it’ll be good for business.

And that's what Knox hopes too. "We’re anxious to get medicine in need to the patients in Florida."

The Orlando dispensary location will be open in February. Patients will need permission from the Department of Health. Again, it’s for the low THC. But they can have the full THC delivered to them.
Knox Medical opens doors to Florida’s medical marijuana future

News Source: FloridaPolitics.com

Date: 12/7/16

Behind barbed-wire fences and armed guards, an unmarked, nondescript block building invisible from the road features countless surveillance cameras, a walk-in safe, explosion-proof rooms, and labs stocked with equipment that would make any college chemistry department envious, such as an inductively-coupled plasma mass spectrometer.

This is not Bruce Knox’s father’s flower nursery. Not anymore.

Welcome to Knox Medical LLC’s facilities at Knox Nursery in Winter Garden, for what company officials Knox and Jose Hidalgo vowed would be the first and only public viewing ever of the Central Florida production center for medical marijuana in the Sunshine State.

It’s been more than two years since Florida approved limited medical marijuana, a year since Knox and five other plant growers in Florida received state licenses through a highly-contested competition to get into the business’s ground floor, eight months since the Florida Legislature made limited expansions to the industry, and a month since voters approved John Morgan’s Amendment 2, authorizing huge expansions of medical marijuana next year.

On Friday Knox will make its first product deliveries, medical oils extracted from legally-grown, non-euphoric marijuana, delivered to qualified patients with otherwise untreated epilepsy or other neurological disorders. It’s a modest beginning for what is still an undefined future, one which could grow to hundreds of thousands of Florida patients using all sorts of medicines derived from marijuana, for all sorts of debilitating health conditions.

“What you see is a culmination of a dream and a vision that we’ve had now for two and a half years,” said Knox, co-founder with Hidalgo of Knox Medical, and president of Knox Nursery, a business his family started 55 years ago. “A world-class, state-of-the-art processing facility... which will ensure the highest-quality product to our patients in the state of Florida.”
Knox Medical’s production center is the only facility currently licensed to grow in Central Florida but can sell anywhere in Florida. Starting Friday and for the foreseeable future the company will use unmarked vans to deliver, to the homes of state-approved patients, the oil extract based on a branded product in Colorado known as “Charlotte’s Web.” Knox’s oil, like that alternative medicine, will be extracted from marijuana plants cultured to have a very-low level of the chemical THC that gets people high and a very-high level of the chemical CBD, which experiences in Colorado and elsewhere has shown to have strong therapeutic power to stop seizures and ease other neurological disorders.

It’s not cheap and it’s not covered by health insurance. The going price is about 17 cents a milliliter, which works out to about $100 a bottle, though Knox said the company is working with the Epilepsy Foundation of Florida and another foundation to make it affordable on a sliding scale for patients with financial challenges.

Soon, Knox intends to open unmarked retail dispensaries near Florida Hospital in downtown Orlando, and in Gainesville, Jacksonville, Tallahassee and Lake Worth.

Eventually, Knox intends to start selling other products, including those made from full-strength THC marijuana, and including edible and smokable forms. The 2016 Legislative Session expansion makes some of that possible, and Amendment 2 – once the Florida Legislature and Florida Department of Health codify it – will make far more possible. Knox already is growing high-THC marijuana at an undisclosed site, among some 19 varieties the company is currently cultivating.

And eventually the medical marijuana market, currently limited to just 1,100 qualified patients statewide, is expected to boom, to include everyone from cancer patients seeking something to take the edge of chemo-therapy nausea, to veterans seeking relief from post-traumatic stress disorder.

The 72 percent approval for Amendment 2 on Nov. 8 showed Floridians are ready, Hidalgo said.

“I think education is key. My mom is 72 years old. She was completely freaked out... Just showing her how a suffering child is having 70-plus seizures a day and a single drop of CBD non-euphoric oil and the seizures stopped, she was already on board,” said Hidalgo, president of Knox Medical. “This is a new
world, when you talk about pharmaceutical. It’s not quite pharmaceutical. It’s not quite like pot. It’s a new space in medicine. And it’s an exciting time.”
Winter Garden nursery shows off medical marijuana facilities

News Source: Orlando Sentinel

Date: 12/12/16

Winter Garden nursery owner says medical marijuana is personal for him.

A row of greenhouses under construction at Knox Nursery will soon be home to rapid expansion of Florida's newest cash crop: medical marijuana.

Some marijuana was already harvested at the Winter Garden firm recently, for Friday's first deliveries of medical pot products in Central Florida.

The nursery's owners gave tours Wednesday of the just-completed processing center. In laboratories and extraction rooms, marijuana will be ground into a fine paste before the plant's oils are extracted. In the same large building, the oil will be tested and turned into drops, capsules and cartridges for electronic cigarettes.

For now, only a small number of people suffering from seizures are able to get the products, with a doctor's authorization. But that customer base is expected to grow rapidly as Florida officials broaden medical marijuana use in response to the passage of Amendment 2 on Election Day.

"This is a very exciting day for us," Bruce Knox said. "Everything has been done with the patients in mind." He added, "Our facilities are designed for expansion."

Meanwhile the company is beginning to build out its storefront north of downtown Orlando, at 1901 N. Orange Ave. It has been permitted for the dispensary, which Knox and others compared with a drug store, for a very narrow clientele.

"It's not a smoke shop or head shop. It's a very tightly controlled industry," said Knox's land-use attorney, Tara Tedrow of Orlando-based law firm Lowndes, Drosdick, Doster, Kantor & Reed.

About 20 people work in Knox's marijuana business now, including chemical engineer Alex Karol. Bruce Knox said he expects to keep hiring as Florida
expands medical marijuana markets, up to 100 people. The conventional nursery employs about 120 people.

A report earlier this year, The State of the Medical Marijuana Industry, projects Florida sales could reach $1.6 billion by 2019, but that depends on how quickly the state moves ahead with loosening regulations as directed by voters in November. At the same time, some cannabis business groups have expressed growing concern over anti-marijuana sentiment among the incoming administration of President-elect Donald Trump.

Knox Nursery has been in business for 50 years, growing flowers and landscaping plants for Florida's resort industry. It has a sprawling campus of greenhouses totaling about 700,000 square feet. Amway Center, where the Orlando Magic play, is 875,000 square feet.

The marijuana greenhouses are building out at 30,000 square feet. The marijuana plants are grown in a mix of peat moss. Knox says it uses only organic nutrients to support the marijuana plants, certified by Organic Materials Review Institute.

To run the marijuana business, Knox Nursery has spun off a new company, Knox Medical, with financing and involvement of Miami financier José Javier Hidalgo, who will serve as CEO. Hidalgo is also founder and CEO of Miami-based Cansortium Holdings LLC, which advertises "expertise to help launch mature and professional cannabis markets."

Hidalgo said 1,180 people have registered to use medical marijuana in Florida. Knox officials declined to provide pricing.

"Some patients will qualify for free supplies, and some for deep discounts through the Epilepsy Foundation," Hidalgo said.

Knox, who designed the new facilities, said he understands the need for medical marijuana.

"For me there's a personal side to this. I have two family members who have epilepsy," Knox said.
Medical pot delivery thrills St. Cloud resident with mystery illness

News Source: Orlando Sentinel
Date: 12/09/16

The delivery of a small package of medical-marijuana products Friday at a patient's home in St. Cloud was a joyous occasion.

It's been more than four years since Matthew, 25, has lived a normal life, he and his mother said. His illness hasn't been diagnosed. Stomach spasms don't allow him to digest food properly, and he suffers from other pain in his joints and extreme fatigue. But taking small amounts of a medical-marijuana extract during the last few weeks has made a dramatic difference so far.

"It's a miracle really because I can eat real food again," Matthew said. "Before, my dinner would be a couple saltine crackers. That was all I could handle sometimes."

Matthew is one of the first patients in Central Florida to receive locally grown medical marijuana products. He and his mother, Connie, didn't want their full names used because of controversy surrounding medical marijuana and security concerns. Matthew also doesn't want the illness to define him.

Knox Medical is the only designated provider of medical marijuana in Central Florida. It was launched by the owners of Knox Nursery, which for 50 years has grown flowers and landscaping plants for Florida's resort industry.

Under Florida's Compassionate Medical Cannabis Act of 2014, only a small number of people suffering from seizures, muscle spasms, or terminal conditions are able to get the products, with a doctor's authorization. But that customer base is expected to grow rapidly as Florida officials broaden medical marijuana use in response to the passage of Amendment 2 on Election Day.

Knox is also building a dispensary storefront north of downtown Orlando, at 1901 N. Orange Ave., that has been permitted for a very narrow clientele.
Matthew and his mother said they want Floridians to know how grateful they are that marijuana medicine products have become available.

"He's been slowly dying right in front of us," Connie said. "I think the people opposing this don't have anyone that is suffering this much in front of them, someone who can benefit from this."

Matthew is still about 40 pounds under his weight in high school, when he played baseball. He tried to continue playing baseball in college, but had to drop out. In 2013, he was hospitalized.

"He's basically been sick ever since then," his mother said.

They count around 150 doctors they've seen, and about 70 different medications.

"It's all we do really, really, is go to the doctors," said Connie, who runs a small real estate business. "If I had a normal job, I'd be out of work and homeless probably, but I would do anything to help Matthew."

On Friday, employees of Winter Garden-based Knox Medical delivered the medicine directly to their door. A white minivan arrived. Dressed in a white lab coat, Christopher Seefeldt, operations manager for Knox, handed off the package.

Matthew's prescription was written by Dr. Justin Spooner, a specialist with a background in psychiatry and pain who prescribes low-THC marijuana products.

A limited number of doctors in Florida are permitted to prescribe medical marijuana, and many of them are focused on epilepsy or pediatrics, Connie said.

"I called 21 doctors, trying to get ahead of the regulations and get Matthew on a list early," Connie said.

She says she's heard people wondering how someone could give medical marijuana to a family member.

"People think of it as a drug. Well, he's BEEN taking drugs for years, lots of them, and many had serious side effects. This works, and it has no side effects," Connie said. "People need to start thinking of this as medicine, not as a drug."
The digestion problem has meant that Matthew rarely leaves the house. On long drives to Jacksonville to see the doctor, he wouldn't eat at all.

"I wouldn't eat either. I would not eat in front of him," Connie said.

The family said they were looking forward to a holiday party with plenty of food and family Saturday.
Medical marijuana deliveries begin

News Source: South Florida Business Journal

Date: 12/09/16

Knox Medical today ushers in a new era of medicine for the state of Florida, sending out its first batch of medical cannabis deliveries to qualified patients.

With plans underway to open locations in Lake Worth and four other cities, Knox Medical is among the first companies approved by the Florida Department of Health to dispense medical cannabis and the plant’s low-THC variety.

“Knox Medical is producing superior quality medicinal cannabis, and our mission is focused on putting the needs and interests of patients first,” said Knox Medical CEO Jose Hidalgo. “At every stage in this process, from cultivation to dispensing at our medical facility, from engaging physicians and guiding patients throughout this process to building first-in-class dispensaries throughout Florida, our objective at Knox Medical is to exceed the definition of excellence at every level.”

Friday’s deliveries will be shipped from a nursery in Winter Garden, a suburb of the Orlando metro area, to a patient in the Central Florida town of St. Cloud. Patients in South Florida are expected to receive their deliveries the following week.

Knox Medical is one among many Florida businesses poised to benefit from the expected economic impact of medical cannabis.

Estimates outlined by a September Miami-Dade County Commission report project annual medical cannabis sales in the “Southern Region” — made up by Miami-Dade, Broward, Palm Beach, Monroe and Martin counties — to reach nearly $300 million.

Annual sales could generate as much as $124.5 million in Miami-Dade County alone.

And it isn’t just dispensaries set to rake it in now that Amendment 2 has passed with a super-majority among Florida voters.
A medical marijuana business networking group at Kelley Kronenberg’s West Palm Beach office revealed the breadth of the nascent industry, said Howard Wander, who heads the law firm’s regulated substances practice group.

“There were contractors who build out commercial spaces, to marketing companies, data companies, doctors, private equity firms ... It’s a multibillion-dollar industry,” he said. “These aren’t potheads. These are business people with extreme ability to contribute money and make money.”
Winter Garden nursery makes first marijuana delivery

Delivery made to patient in St. Cloud

News Source: WKMG Orlando News 6

Date: 12/09/16

WINTER GARDEN, Fla. - A Winter Garden nursery that has been in business for decades did something Friday that it has never done before: make a delivery of medical marijuana.

Knox Nursery made its first delivery Friday afternoon to a home in St. Cloud.

The nursery won a competition to become the only grower and dispensary for the entire Central Florida region.

Connie, who did not want her last name used, was excited about the delivery to her 25-year-old son, Matthew. "It just opens up a whole new door for him to be able to live a normal life and not be in pain so much," Connie told News 6 reporter Amanda Castro.

Matthew did not want to go on camera.

She said he has been sick for the last 8 years with severe stomach and leg spasms that prevent him from keeping food down.

He has not been able to leave his home for the last four years.

"He has so many body aches and pains that he's not able to function," Connie said.

Connie told News 6 that Matthew has seen more than 71 doctors and has taken more than 150 medications, and nothing has worked.

She said her son did not want to live anymore.

"You have to tell them, 'We will find something, we will find a way,'" Connie said.

Matthew started taking cannabis oil with low THC a couple of weeks ago.
"Once he saw the results, it didn't take much, and it just turned his whole life around," Connie said.

Matthew is moving around more and can eat again, hopeful that this will make his life better. She said she's not concerned about her son using marijuana as medicine.

For now, Knox Nursery is producing only "non-euphoric" marijuana that can be used for certain conditions, not the broader medical marijuana that Florida voters approved in November.
Home delivery of medical pot only certain thing as new medicinal marijuana laws go into effect

News Source: The Florida Times-Union

Date: 1/03/17

When a small package arrived at Gabriel George’s Northside Jacksonville home Tuesday afternoon, he knew he finally could get some relief for a nerve injury he suffered in a motorcycle accident nine years ago.

George lost most of the use of his right arm because of the accident but he long wanted medicinal marijuana to ease the discomfort from nerve damage. The package that arrived at his home was from Knox Medical LLC, one of only seven legal medicinal marijuana growing operations in Florida.

“This is very important to me because it’s giving me a sense of livelihood back,” George said. “I have spasms and my whole arm is paralyzed... .”

The medicinal marijuana delivered to George’s home was in the form of a droplet liquid that he uses to put two drops under his tongue.

It’s also low-THC (or low potency) marijuana known as Charlotte’s Web that was legalized in Florida two years ago.

For the company that grows the marijuana, Knox Medical, it was the first home delivery of the drug to the Jacksonville market since the company started cultivating the plant in Winter Garden outside Orlando two years ago.

The publicized home delivery of the drug to George was an orchestrated public relations event, but it also came on the same day that more potent medicinal marijuana was officially legalized in Florida after state voters overwhelmingly approved use of the drug in the Nov. 8 election.

The intention of Knox Medical’s officials in alerting the media to the home delivery was to point out that access to medicinal marijuana is becoming easier, while regulations on the new and stronger medical pot use remain in a state of flux.
While regulatory issues are yet to be settled, the entire issue of medicinal marijuana in Florida has been shrouded in legal spats and competitive business challenges.

While Charlotte’s Web was approved by the legislature, some local municipalities such as Jacksonville considered moratoriums to prevent the sale of the drug in cities. The growing rights to the stronger medical pot were also embroiled in legal battles with some saying the state licenses granted to growers amounted to a monopoly. Even a nursery in Jacksonville, Loop’s Nursery, sued hoping to get in on the growing business but was rejected by an administrative law judge.

Knox Medical’s CEO Jose Hidalgo said the company already provides home delivery of medicinal Charlotte’s Web in other areas of the state and they’ve been providing similar delivery for even stronger forms of the drug that was granted exceptions through a state legislative exemption approved over a year ago.

Hidalgo said state residents who need the medicinal marijuana can start adjusting to getting it more readily.

“We’re required to cultivate and manufacture within Central Florida, but our license allows us to open dispensaries and deliver throughout the state of Florida without any restrictions,” Hidalgo said. “Given that our main focus is to help patients and families of those in need, wherever those patients may be in the state of Florida we will deliver it to their house.”

Knox Medical is actually the state-designated medicinal pot grower for Central Florida. Chestnut Hill Trees in Alachua outside of Gainesville is the designated cultivation center for Northeast Florida. But Chestnut Hill spokeswoman Lyndsey Brzozowski said the grower just recently finalized all authorization and the drug is not readily available for delivery.

“CHT Medical received authorization from the Florida Department of Health’s Office of Compassionate Use to process and dispense medical cannabis on Wednesday, December 21, 2016,” Brzozowski said in an email. “Given that recent development, CHT Medical will begin making deliveries within two to three weeks.”

The first home delivery of medicinal pot to Jacksonville by Knox Medical comes as over 50 municipalities in Florida — including several on the First
Coast — approved moratoriums on dispensaries for the drug while local governments settle zoning regulations for the potential business operations.

Several regulatory issues also remain uncertain as legalized high-potency medical marijuana went into effect Tuesday.

Outside of sales tax, state government still hasn’t settled how it will tax medicinal marijuana. It’s still not certain if it will undergo similar user taxes that apply to alcohol, for instance.

Richard Blau, an attorney for the Regulated Products Group for the law firm GrayRobinson, said in a Nov. 19 Times-Union report the regulations for growing and selling high-potency medical marijuana will still need more clarification. “The Legislature has to come together in 2017 and really fill in the details and define the many, many variables that exist within the model of legalization that was provided by Amendment 2,” he said.

Even Florida Sen. Rob Bradley, R-Fleming Island, who drafted much of the Charlotte’s Web legislation, has said if there is a high demand for medicinal marijuana he could see the growing businesses jump from about a half dozen to nine or 10 in short order under the current law.

George’s physician Terel Newton, an anesthesiologist who practices in Jacksonville, said it’s not quite as difficult to get the medical marijuana as it initially seems. He said patients wanting the drug are dependent, though, on physicians who support the treatment.

“You usually get a referral from the patient’s neurologist to evaluate the patient when they have failed all conventional options or have significant side effects from the current medications,” Newton said.

But then Newton steps in and develops a personalized treatment plan that could include medicinal marijuana after about three months of observation. Physicians like Newton then turn to the medical marijuana manufacturers approved by the Florida Department of Health, the agency that issues the growing licenses.

“I put in a cannabis order for them [patients] with the office of Compassionate Use register,” Newton said. “I have the patient call the dispensary [manufacturer] to arrange delivery of the medicine. Then the dispensary confirms the patient’s identification ... and then they arrange for delivery.
“I think the thing that is complicated is that it’s relatively new here. So, if you have a physician that’s not comfortable with the concept of medical cannabis as a medicine, then they may not be willing to refer the patient to begin with,” Newton said.

Hidalgo said the home delivery is within the realm of affordability.

Knox Medical even offers special discounts and cost deductions for poor patients. For other patients, home delivery can cost about $25 for the delivery service in the Orlando area or about $50 for delivery to areas as far away as Jacksonville. The drug itself costs about $90 per 600 milligrams of medicinal marijuana in whatever form it is administered.

“At that point, they make a payment for the medicine and we give them the medicine. It’s a fairly simple process,” Hidalgo said.

Basically, Hidalgo said, home delivery is about the only simple aspect to the new medicinal marijuana laws that went into effect in Florida.

Even Hidalgo said state lawmakers and regulators will need to hammer out more stipulations surrounding availability of the drug.

“We’re getting phone calls every day from patients that have conditions that are expanded but cannot receive the medicine. So, we’re all as eager as you [patients] to get directions from the Department of Health,” Hidalgo said. “We’re all waiting. There’s a lot of confusion out there... . It is a very fluid situation and we expect to see some sort of directive from the Department of Health later this month.”
Central Florida Dispensary Makes First Medical Marijuana Delivery In Jacksonville

News Source: WJCT

Date: 1/03/17

A Central Florida marijuana dispensary made its first delivery to a Jacksonville patient Tuesday — the same day a constitutional amendment goes into effect that will make more types of medical cannabis available to Floridians.

Knox Medical is one of a handful of Florida dispensaries that have been allowed to open under a 2014 law.

Navy veteran Gabriel George used his one good hand and mouth to rip open the plastic packaging of his recently delivered medical marijuana treatment.

“They checked my ID and all that to make sure it was me,” he said.

Inside is a small bottle of tincture liquid that’s administered using a couple drops under the tongue.

The 30-year-old medically retired from the Navy in 2009 after a motorcycle accident left him partially paralyzed, suffering nerve damage and spasms. His right arm hangs loosely at his side.

“I broke my (back), six ribs, my collar bone, scapula, both lungs collapsed which ripped the nerves my spinal cord which paralyzed my right arm,” he said. “I have an 8-year-old daughter that is my motivator and I’m here.”

George’s neurologist suggested non-euphoric marijuana could help with the side effects of his cocktail of pharmaceutical medicines. He turned to anesthesiologist Terrell Newton, one of Florida’s roughly 200 licensed marijuana prescribers.

“Knox is one of the recently certified and licensed dispensaries, of which there’s going to be a total of six in Florida. This is their first delivery into the Jacksonville area,” he said.
The state awarded Knox the license for Central Florida, and it was finally given the go-ahead in December to sell its product after an extended court battle. Growers challenged the state as it made rules governing who can grow and sell non-smoked, non-high-inducing marijuana, starting in 2014.

The state has decided on a maximum of six facilities, four including Knox are already doing business, while two more are awaiting licenses.

While more than 70 percent of voters last year approved constitutional Amendment 2, which increases the number of conditions approved for marijuana treatment in Florida and legalizes regular strains of the product, the legislature has to decide on how to implement it.

Sen. Rob Bradley, R-Orange Park, told WJCT in November he foresees a smoother implementation of the constitutional expansion. He’s the sponsor of 2014’s “Charlotte’s Web” law, which legalized non-euphoric strains of marijuana for treatment of seizures, spasms and a small list of other chronic conditions.

“We are not getting caught flat-footed. There is infrastructure already in place. There is a regulatory system already in place to handle the new patients that are going to come on board with the passage of Amendment 2,” he said.

State lawmakers still have six months to come up with a new regulatory framework and nine months to fully implement the expansion.
Jax First: Jacksonville Veteran gets first shipment of medical marijuana

News Source: WTLV First Coast News Jacksonville

Date: 1/03/17

New marijuana laws are taking effect from coast to coast in 2017. The expansion of who can use medical marijuana, known as Amendment 2, took effect Tuesday for Floridians.

That means medical marijuana can be used for a wider range of debilitating illnesses here in Florida after being approved by more than 70 percent of voters last year.

A local veteran got his first shipment of low-THC, high-CBD medical marijuana at his Jacksonville home Tuesday afternoon. It was the first time medical marijuana was delivered to a patient in Jacksonville.

Gabriel George says he battles excruciating pain everyday.

"I've done everything. I've done every pain pill, every muscle relaxer, every prescription pill you can find. I've had multiple surgeries," George explains.

In 2008, George, a U.S. Navy Veteran, says he was leaving bible study heading down Atlantic Boulevard when his motorcycle collided with a car.

"Right at 9A, someone pulled out in front of me. They didn't see me. I woke up three weeks later. I broke my C2, C5, 6 ribs, collar bones, scapula, both lungs collapsed..." says George.

Nearly 9 years later, George's right arm is still paralyzed. He suffers from a severe nerve damage and a minor brain injury.

In constant pain, George says his quality of life is dismal. Now he's taking the holistic approach to pain management, looking to Dr. Terel Newton of Total Pain Relief in Jacksonville.

"I'm very happy and excited," says Newton.
Newton prescribed George low-THC marijuana in the oil form. Newton says the side-effects of low THC marijuana is comparable to taking Tylenol, including upset stomach, headache, and dizziness.

"You don't feel anything in terms of a psychoactive affect," Newton says.

Which means the patient does not get high, according to Newton. The treatment comes from Knox Medical, a dispensary near Orlando.

Knox Medical will open five state-of-the-art dispensaries in early 2017 in Orlando, Gainesville, Jacksonville, Lake Worth and Tallahassee, according to a representative.

A 600-mg. bottle costs $90. Insurance doesn't cover the cost.

It's a bill George is happy is pay.

"I'm able to do more, smile more. I'm able to eat without it hurting or causing more problems. Especially getting back to doing things with my daughter," says George.

In Florida, medical marijuana is only available by oil, vapor or pill form. It is still illegal to smoke marijuana, medical or otherwise, in the state.
Jacksonville veteran receives Charlotte's Web delivery 2 years after legalization

News Source: Action News Jacksonville

Date: 1/03/17

**JACKSONVILLE, Fla.** - Before Florida voters approved Amendment 2, lawmakers signed off on the less powerful form of medical marijuana known as Charlotte’s Web.

Two years after its approval, the first delivery of low-THC oil was made in Jacksonville by a company hoping to one day open a local dispensary.

Knox Medical, based out of Winter Garden, Fla. made its first delivery of Charlotte’s Web in Jacksonville Tuesday to a 30-year-old veteran.

Gabriel George said the pain hasn’t stopped since a motorcycle accident in 2008.

His right arm became paralyzed and he was medically discharged from the U.S. Navy.

George now suffers from muscle spasms.

“(It's) like I’m being tazed all day long," George said. "It never goes off. It just turns down."

He said opioids didn’t work for him, so he turned to marijuana.

Under Florida’s compassionate medical cannabis act of 2014, Knox medical is able to provide low THC medical marijuana products with a doctor’s authorization to patients with cancer, terminal illness, seizures and muscle spasms.

George's doctor said said opioids didn’t work for him, so he turned to marijuana.

His doctor Terel Newton, medical director of Total Pain Relief, said Charlotte’s Web leaves his patients with fewer side effects and better results.
“A patient I spoke with this morning has been seizure free for about a month now,” Newton said.

George said people who knock medical marijuana might not realize the good it can do.

“Look, observe,” he said. "I’m able to be here. I’m able to talk because of it. I’m able to have some sense of life back.”

Knox Medical is planning to open five dispensaries in early 2017 throughout Florida, including Jacksonville, Orlando, Gainesville Lake Worth and Tallahassee.

The delivery of the low-THC medical marijuana comes on the same day that Florida Amendment 2 goes into effect.

The amendment that legalizes medical marijuana was approved by 71 percent of Florida voters and allows higher strength marijuana be used for a wider list of medical ailments.
Sick Child Prime Example Of Florida’s Delay In Delivering Lifesaving Medical Pot

News Source: CBS 4 Miami

Date: 1/04/17

MIAMI (CBSMiami) – Five-year-old Bruno Delgadillo could be the poster child for Florida’s slowness in getting medical marijuana to those who need it.

The boy suffers severe, possibly life-threatening seizures that low-dose marijuana can control.

His mom, waiting on state approval, at one point took her son to Colorado where pot is legal.

“Because my family lives here in Florida, and I didn’t have the support like I do here, I had to come back,” said Bruno’s mother, Jacel Delgadillo.

But finally a package arrived Wednesday.

Bruno’s first bottle of liquid, low-dose pot that doesn’t cause a high, but can contain his seizures.

“I’ve been fighting for his medical cannabis since 2013. It’s been a battle,” Delgadillo said. “It’s very frustrating. I’ve met parents that have lost their children along the way, just waiting.”

The legislature approved the so-called Charlotte’s Web drug in 2014, but it took nearly two years to even begin getting the treatment to patients.

A law passed in 2015 allowing more powerful pot pills for the terminally ill has dragged its way into practice as well, and the state has just begun to consider rules after voters last year approved full-strength pot to treat a host of illnesses.

Adam Sharon of Knox Medical, one of only three companies licensed to produce medical marijuana in the state, said lawmakers and regulators don’t want Florida to become a marijuana “wild west.”
“They’re thinking of California, they’re thinking of Colorado and they don’t want that here,” Sharon said. “The governor and health officials are moving very, very carefully.”

Sharon said he believes attitudes in Tallahassee are easing and medical pot will begin to move more quickly to patients.

For Jacel Delgadillo and her son, relief has finally arrived.

“I don’t have to be fighting for his medicine anymore, I don’t have to be convincing people that this is what he needs,” Delgadillo said.

For countless other patients, however, the painful wait for pot that can help drags on.

The use of full-strength medical pot, approved by more than 70 percent of Florida voters in November, will go nowhere until after the legislature lays down the law on just how it will be enacted.
New Medical Marijuana Law Having Big Impact on Miami Family

News Source: NBC 6 Miami
Date: 1/03/17

Florida's new medical marijuana law is set to have a big impact on many families throughout the state, including one right here in Miami.

Bruno Stillo suffers from epilepsy but Wednesday is a big day, with marijuana oil being delivered to his mom for the first time ever.

"Just knowing that it can be brought to my house, to my living room, and I do not have to worry about going anywhere or if he is having a seizure in the car or is my mom taking care of him, is he okay with her," mother Jacel Delgadillo told NBC 6.

Just going outside, a simple task for most of us, is not easy at all for Delgadillo. Bruno, five years old, is a big boy, and it can be difficult getting him around.

Florida's medical marijuana laws now permit delivery of marijuana oil. Seven organizations are licensed to grow and distribute the oil.

Amendment 2, which passed in November, also allows patients to use a higher strength marijuana. State officials are crafting the framework for expanding the state's medical marijuana program.

The bureaucracy, and slow start of a medical marijuana program, can take a toll on a family.

"I did not want my son to be one of the children who passed away, waiting, because I know parents that lost their children while they were waiting," Delgadillo said.

Cannabis oils have greatly reduced the number of seizures that Bruno suffers. For his mom, it's all about quality of life. She says home delivery will make a big difference, and more potent oils will help even more.

"I am thankful that it finally is moving along and that there is more coming with it, baby steps will lead us to broader steps and relief," Delgadillo said.
Family receives first medical marijuana shipment for epileptic son

News Source: FOX 7 WSVN

Date: 1/04/17

WEST MIAMI-DADE, FLA. (WSVN) - A South Florida family received its first shipment of medical marijuana, Wednesday, one day after the drug became legal for medical purposes in Florida.

Jacel Delgadillo’s 5-year-old son, Bruno, has a rare form of epilepsy, and she believes low-THC medical marijuana will stop some of his sever seizures.

“Anything can cause seizures for him, over-excitement, heat, light,” she said.

The marijuana for Bruno comes in oil form, and he will take it multiple times a day.

“Three times a day, four drops,” Delgadillo said. “So four little drops.”

Winter Garden-based Knox Medical provided the marijuana to the Delgadillo’s Miami-Dade home, their first delivery in South Florida. They are one of only a handful of businesses approved by the state to offer the drug to qualified patients.

“Yesterday, we were in Jacksonville delivering to a U.S. Navy veteran who was inured,” said Adam Sharon of Knox Medical. “It’s about time they got it.”

Delgadillo said she has battled for access to marijuana for her son for a long time.

“This is not a gateway drug, this a a life-saving drug,” she said.

With the passage of Amendment 2 in November, Florida’s constitution will soon allow more people — kids, teens and adults — suffering from a longer list of medical conditions to access medical marijuana.

“In the past, I had to bring him to a legal state to try it,” Delgadillo said, “so I know it helped him then. It’s gonna help him now. This medicine is gonna be gold.”
Knox Medical will open five dispensaries across the state this year, but so far, the closest to South Florida will be in Lake Worth.
Boy with epilepsy is second in Florida to get shipment of medical marijuana

News Source: WPLG 10 News

Date: 1/04/17

MIAMI-DADE COUNTY, Fla. - At 5 years old Bruno has a rare form of epilepsy, which can cause him to have up to 300 seizures a day.

By using medical marijuana Burno is able to reduce the number of seizures he has a week to about three or five, according to his mom Jacel Delgadillo

So on Tuesday, when the little patient received a shipment of low-THC medical marijuana -- something his mom had been fighting for him to be allowed to use the drug for years – the entire family was thrilled.

"His medicine being delivered to him, I don't have to travel or worry about who is going to watch him," Delgadillo said. "It's a sense of relief for us."

And this is just the start of change in the state.

Low-THC cannabis was actually approved for patients like Bruno two years ago, and in November, Florida voters approved Amendment 2, and that means more patients will be able to qualify for the stronger strain of the drug.

But it won't happen overnight.

Under Amendment 2 the Florida Department of Health has six months to craft rules related to medical marijuana treatment centers and clarify what doctors and dispensing organizations can legally do.

The state has nine months to start issuing patient identification cards.

Those with HIV/AIDS, cancer, and PTSD are qualified for a card under the new law, in addition to those with other debilitating medical conditions for which a physician believes the use would likely outweigh the potential health risk to the patient.

As for Delgadillo, Wednesday felt like the end to a very long battle.
"It's a miracle, we are very emotional and just really excited," she said.
5-year-old with seizures now being treated with medical marijuana

News Source: The Miami Herald

Date: 1/04/17

Jacel Delgadillo’s hopes for her 5-year-old son Bruno finally knocked on the door of her Fontainebleau apartment Wednesday.

The Nicaraguan mother received the first shipment of medical marijuana oil that will help control Bruno’s convulsions. Delgadillo paid $75 for the medication, and must give her son four drops three times a day for one month.

Bruno has suffered seizures since he was 3 months old because of a rare form of epilepsy, Dravet Syndrome. He gets a fever, followed by up to 300 seizures in a single day.

Delgadillo said cannabis with a low level of tetrahydrocannabinol (THC), the psychoactive agent in marijuana, is the only medication that controls the seizures without leaving him bedridden.

The use of this type of marijuana, which is not smoked, has been legal in Florida under the state’s Compassionate Medical Cannabis Act of 2014. The law allows patients who suffer from seizures, severe muscle spasms or cancer to receive the low-THC cannabis, commonly known as Charlotte’s Web.

“I don’t want to see him like a vegetable. I want him to be a boy who plays with his sister, who crawls, who has a life,” said Delgadillo, an activist in Cannamoms, which lobbied lawmakers in 2014 for the legalization of medicinal marijuana.

Under the 2014 law, the companies authorized to grow, process and distribute medical marijuana in Florida began to distribute their product only last year because the state had to establish the regulations governing the new industry.

The authorized distributors are CHT Medical, The Green Solution, Trulieve, Surterra Therapeutics, Modern Health Concepts — the only one in Miami-Dade County — and Knox Medical.
“This was a whole new world for Florida, so it was a long process. That’s understandable, because all the regulations had to be followed,” said Adam Sharon, a spokesman for Knox Medical, which sent the medicine to Bruno’s home.

Under Amendment 2, passed in November by 71 percent of the state’s voters, others will be able to be treated with medical marijuana. The Amendment, which expands medical marijuana to patients with HIV/AIDS, Parkinson’s, glaucoma, multiple sclerosis and other debilitating diseases, went into effect Tuesday. But while the law is official, the Florida Legislature and the state Department of Health still have to work out rules that will govern the state’s medical marijuana industry, delaying implementation.
Medical marijuana company receives license for first dispensary in Jacksonville

News Source: Action News Jacksonville

Date: 1/25/17

**Knox Medical was granted a license for a dispensary at 9901 San Jose Blvd.**

The dispensary is expected to open during the second quarter of 2017.

Knox Medical is planning to open five dispensaries in early 2017 throughout Florida, including Jacksonville, Orlando, Gainesville Lake Worth and Tallahassee.

The Jacksonville location is slated to open after the Orlando and Gainesville locations, the company said.

Knox Medical, based out of Winter Garden, Florida, made its first delivery of Charlotte’s Web in Jacksonville earlier this month.

The delivery to Gabriel George, a Navy veteran, came two years after the low-THC oil was legalized in Florida.
An inside look inside a medical marijuana 'factory'

News Source: WTLV First Coast News Jacksonville

Date: 1/26/17

ORLANDO, Fla. - In the spring, an Orlando-area-based company will open multiple medical marijuana stores including one in Jacksonville.

"If you were to ingest this, you would get the full medicinal benefits out of it," said Alex Karol, lead Chemical Engineer for Knox Medical, referring to the product created there.

Past the flowers at Knox Nursery and beyond the security guards is a booming operation.

"We just have a passion that everyone who needs this medicine gets it and at the best quality," said Jose Hidalgo, co-founder of Knox Medical.

Currently, Knox Medical is building a nursery the size of a football field for its product.

"This oil is at the second to last state before we dilute it," said Karol.

The type of medical marijuana made here is in oil form. It's low-THC, which means you can't get high from it.

"This is what we use to extract the ethanol out of the oil - evaporate it into this cooling chamber then it gets re condensed back into its pure form."

Bruce Knox is one of the co-founders. He wants people to know their business is no fly-by-night operation - it's heavily regulated.

"It's all to ensure patient safety, dispensing organization safety and to deliver the highest quality medicine to the patient," said Knox.

The owners say they hope to have the Jacksonville location on San Jose Boulevard open by March.
Volusia-Flagler in plans for nearest pot processing firm

News Source: Daytona Beach News Journal
Date: 2/2/17

WINTER GARDEN — Tucked amid the rolling hills of citrus groves just west of Orlando, gardeners with big straw hats tended rows of geraniums and Mexican petunias on the sunny grounds of Knox Nursery. Nearby, construction crews could be heard building greenhouse space about half the size of a football field for a new, more controversial plant.

The 55-year-old nursery and affiliate company Knox Medical together possess one of just seven licenses in the state to grow, process and distribute medical cannabis. The 23-acre bedding-plant farm expects to have the greenhouse complete by the end of this month and the company plans to grow about 15,000 marijuana plants in just one of their new greenhouses on the outskirts of a metropolitan area with nearly 2.2 million people. So, unlike an average bedding farm, Knox has an armed security guard at the nursery's gate.

Of the seven license holders, Knox Medical's processing plant is nearest to Volusia County, and a company spokesperson recently said they have high interest in setting up retail sites here where customers can buy their medicine directly. But any of the seven cannabis firms could potentially create a local presence.

Florida's Amendment 2 — which permits more patients with a wider range of debilitating medical conditions to be treated with medical marijuana — was approved by 71 percent of voters in November and became law Jan 2. Since then, cities both locally and statewide are scrambling to either enact regulations or set a timed delay on new projects through moratoriums until the Legislature and the Department of Health can set rules.

Once they do, the number of licensees and the number of patients have the potential to change drastically, meaning Volusia or Flagler County could not only have several dispensaries crop up here, but an already active agricultural scene could translate into fertile ground for any new growers.

On a recent tour of the processing plant, Knox Medical co-founder and Chief Executive Officer Jose Hidalgo and partner and Knox Nursery owner Bruce
Knox talked about overseeing the construction of the state-of-the-art, 30,000-square-foot greenhouses and laboratories that are the crux of the operation.

"When this is done, it's going to be just an amazing thing," said Hildago, noticeably proud of the project he's helped steer.

**PROCESSING**

Contrary to what the debated drug might suggest, no bongs could be seen inside the processing facility or on the garden grounds. Instead, the narrow, white, fluorescent-lighted halls conveyed a clinical feel.

Once the plants are fully grown in the completed greenhouses, they will be taken to a holding area in the laboratory and hung to dry for about five days, said lead chemical engineer Alex Karol. Then the foliage is ground up, tested for impurities and run through a custom-built machine called a CO2 extractor. Very basically, the machine, designed by Orlando-area engineer Dwayne Dundore, uses heat and pressure to strip the oils out of the plant.

"The entire operation bottlenecks with this apparatus," Karol said, adding that the research and development the team continues to make the products better. "It's important for us to do a lot of R&D here."

When the oil is completely extracted, it is diluted and then packaged for use with dosing methods such as vaporizer pens and droppers.

For now, the company has been distributing many of the devices to the licensed doctors they do business with to give away, Hidalgo said.

"We want to make sure that patients have access to the medicine," he said. "And if they don't have a device to distribute, how can they have access?"

**SECURITY**

But before the medicine goes out to those doctors, it spends its remaining time at the facility inside a massive safe, which Hidalgo said was built on-site for not only the medicine, but the company's cash supply.

The floor is acid-proof and a five-man game of poker could be held inside.

"It's a little over the top," Hidalgo said. "There are only 60 in the world."
But Hidalgo isn't taking any chances. The rules — especially those on banking for a federally regulated, Schedule 1 narcotic — are still muddy enough that he wants to be prepared for as much as he can.

And while other licensees are a bit more cagey about the location of their cultivation projects, Hidalgo and Knox are extremely proud of their security, which is tight, even in the early stages, while the company is getting things up and running.

Employees have to pass a background screening, Knox said, and everyone who enters the building has to check in and out through a digital sign-in system at the door. And Hidalgo said at least 100 cameras run throughout the facility.

"There are no blind spots in any part of this building," he said.

Knox wouldn't give specific costs incurred during the startup of the company, but he estimated them "in the millions."

"There's one piece of equipment in the lab that's a half-million dollars," Knox said, adding, "It's all about getting the highest quality medicine to our patients, so we really have spared no expense when it comes to that."

**EXPANSION**

While everyone waits to see what rules lawmakers will set in the legislative session that begins March 7, another four doctors have been licensed to order medical cannabis in Volusia and Flagler counties since Amendment 2 went into effect, bringing the total to 12.

For now, patients permitted to receive medical cannabis can get it delivered to their home by license holders — Knox makes daily deliveries in an unmarked van with a camera — but the companies have plans to set up dispensaries throughout the state.

Already, two other state licensees have opened the first of several dispensing facilities.

Gadsden County-based license holder Trulieve has already opened Tallahassee, Clearwater and Tampa locations since last summer.

But still, one of the bigger concerns among local governments has been what these dispensaries will look like.
"There's a lot of fear of the unknown, and that's perfectly understandable," said Monica Russell, spokesperson for Surterra Therapeutics, another medical marijuana license holder looking to set up dispensaries in Central Florida. Russell said Surterra, based in Hillsborough County, already has a facility in Tampa and is planning five additional dispensaries this year, which she described as "a Whole Foods meets your local coffee shop." To prepare, the company has been doing a lot of outreach on community expectations.

"We want communities that want us," Russell said. That means locations close to medical centers, close to the patients who need the medicine and in cities without moritoriums. "A lot of this is sort of being decided for us."

Knox Medical's Director of Public Relations and Communications Adam Sharon insisted his company's facilities will enhance the neighborhoods where they locate.

Images of the concept designs for a Knox Medical dispensary show a modern storefront, more reminiscent of a doctor's waiting room than a head shop.

"Every Knox Medical dispensary will be a state-of-the-art facility ... modern and professional, and above all, comforting for patients," Sharon said in an email.

And like Surterra and several of the other medical cannabis licensees, Knox Medical has plans for rapid expansion.

The company is planning at least five dispensaries in Central and North Florida — Gainesville, Orlando, Tallahassee, Lake Worth and Jacksonville — and Sharon said they hope to have the Orlando and Jacksonville sites up and running by March. As more locations are added, he said, Volusia and Flagler counties are absolutely in Knox Medical's sights.

"I can't tell you exactly when," said Sharon, "but it's in our plans, definitely."
Legislature ponders expanding who can buy, sell legal cannabis

News Source: The Tallahassee Democrat

Date: 2/18/17

As the Florida Legislature gets ready to make rules to implement Amendment 2, the seven corporations exclusively licensed to grow and sell medical marijuana are raising and spending millions to expand their fledgling operations and protect their stake in what promises to be a lucrative industry.

Current licensees are concerned about protecting their share of the burgeoning market, while at the same time saying they want to make quality medical marijuana available to the people who need it most. All told they’ve hired close to 60 lobbyists to represent their interests before the Legislature, as it sets out to rewrite the rules governing medical marijuana in the state to accommodate what 70 percent of voters approved.

At the same time, patients and physicians depending on medical marijuana for relief from a host of ailments are clamoring for greater access, affordability and diversity of the cannabis curative.

....

By contrast, Knox Medical spent millions building a high-tech operation in Winter Garden, CEO Jose Hidalgo said.

The first phase was to cultivate enough marijuana to make sure they had medicine, he said.

The second phase, almost completed is a 50,000-square-foot permanent cultivation and manufacturing facility.

"Ours was completely conceptualized from ground up to be a state of art medical cannabis facility," he said.

Knox got approval to dispense in December and already plans to open six stores in next 120 days, starting with Gainesville and Orlando. It has a permit to open a store in Tallahassee, too.
"We were not stressed about going to market," Hidalgo said. "We were sharply focused on executing our business strategy."
SANITATION AND SAFETY

Cansortium Pennsylvania, LLC d/b/a Knox Medical, LLC hereinafter referred to as "Knox Medical." Knox Medical currently operates dispensary locations in Florida and is in the process of constructing dispensary locations in Puerto Rico. As such, Knox Medical is well versed in the sanitation and safety requirements in the operation of dispensaries. Knox Medical will implement these measures in Pennsylvania which include written contamination protection procedures, pest protection procedures, medical marijuana product handler restrictions, and hand washing procedures.

ENVIRONMENTAL CONTROLS AND SANITATION

Employees are required to take any precaution necessary to protect against pests, avoid contamination of medical marijuana, follow the restriction of food handlers according to Pennsylvania law, and maintain adequate person hygiene including frequent and through handwashing.

If a condition exists that prohibits the safe and sanitary storage and dispensing of medical marijuana products, the Dispensary Manager may suspend dispensing activities until properly resolved. The Dispensary Manager will ensure that all employees are properly trained on all policies and protocols concerning daily cleaning and sanitizing of equipment, containers, and other surfaces that may come into contact with medical marijuana products. The company will also control any possibility of airborne contamination by ensuring appropriate ventilation systems are maintained and enforcing employee hygiene and health protocols.

CONTAMINATION PREVENTION PROCEDURES

Knox Medical shall maintain its facility in a sanitary condition to limit the potential for contamination or adulteration of the medical marijuana products stored in or dispensed from a Knox Medical dispensary. Knox Medical will develop and maintain written Standard Operating Procedures ("SOPs") for protection against pests and the prevention of contamination of medical marijuana products. These SOPs will include but not be limited to:

• All trash shall be removed on a daily basis or more frequently if necessary and properly secured in an external container for municipal trash removal. At the end of each day, the Dispensary Manager shall survey the interior and exterior of the dispensary to confirm the proper removal of all trash and debris from the interior of the store and such trash has been appropriately stored and secured in external waste bins. All countertops, display surfaces and floors shall be cleaned on a daily basis or more frequently if necessary with non-toxic products to ensure a safe and sanitary environment.

• all floors, walls, and ceilings shall be kept in good repair

• adequate protection against pests shall be provided through the use of an innovative environmentally friendly approach and through integrated pest management processes and techniques that identify and manage pest problems using numerous techniques including biological control, habitat manipulation, and modification of cultural practices. The pest control materials used will minimize risks to human health, beneficial non-target organisms and the environment. Knox Medical will ensure that our pest management program complies with all regulations issued by the Environmental Protection Agency (EPA), the Food and Drug Administration (FDA), and the U.S Department of Agriculture (USDA) and state and local regulations. Knox Medical maintains all current licenses, certifications, and permits required by government agencies to
provide such pest control management.

- any toxic cleaning compounds, sanitizing agents, solvents, and pesticide chemicals will be labeled and stored in a manner that prevents contamination of the medical marijuana products

EMPLOYEES WORKING IN DIRECT CONTACT WITH MEDICAL MARIJUANA

Any employee with direct contact with medical marijuana is subject to the restrictions on food handlers in Section 27.153 (relating to restrictions on food handlers). All employees handling medical marijuana products will conform to sanitary practices according to Knox Medical SOPs while working and will maintain adequate personal hygiene. The Dispensary Manager and Assistant Dispensary Manager will monitor employee’s sanitary practices and personal hygiene in order to ensure compliance with Knox Medical SOPs. Strict compliance with Knox Medical SOPs for sanitation and personal hygiene is a requirement for continues employment at a Knox Medical Dispensary.

HAND WASHING FACILITIES

At a minimum, each Knox Medical dispensary will have adequate and convenient hand washing facilities for both employees and visitors. Such facilities will be furnished with running water at a temperature suitable for sanitizing hands. The hand washing facilities will be located where good sanitary practices require employees to wash and sanitize their hands, including but not limited to restrooms, kitchens, and areas where direct handling of medical marijuana takes place. These facilities will also be stocked with effective non-toxic sanitizing cleansers and sanitary towels or suitable hand drying devices.

Knox Medical understands that our customers are likely experiencing significant physical illness and disability. Therefore, our dispensary facilities will met and dramatically exceed Pennsylvania minimum requirements for all required elements for sanitation. Please see the photo attached to this section for a visual representation of a Knox Medical dispensary in Pennsylvania.

HAND WASHING PROCEDURES

Knox Medical employees must wash their hands in an adequate hand washing area before work and any other times when hands may have become soiled or contaminated. They must also wash their hands before dispensing medical marijuana to a patient or caregiver.

Any employee that demonstrates apparent illness or open lesions that may adversely affect the safety or quality of a product will be excluded from direct contact with components, product containers, closures, in-process materials and finished products. All personnel will be instructed to inform their supervisor of any health conditions that may have an adverse effect on a product. The Dispensary Manager and Assistant Dispensary Manager will be trained in identifying potential illnesses and instructed on how to appropriately discuss the circumstances with the employee.

ACCESSIBLE RESTROOMS/LAVATORIES

Knox Medical will provide its employees and visitors with adequate, readily accessible lavatories that are maintained in a sanitary condition and in good repair. Knox Medical will comply with all other applicable state and local building code requirements.
SAFETY IN A DISPENSARY ENVIRONMENT

WORKER SAFETY AND PROTECTION
The company’s safety policies detail procedures for ensuring the implementation of best safety practices at all times and in accordance with Occupational Safety and Health Administration (“OSHA”) guidelines throughout all facilities and operations.

The systematic guidelines established will be strictly enforced, as the safety of employees and the public is the company’s foremost business consideration.

All employees must comply with all applicable safety regulations as listed in the Standard Operating Procedures (“SOPs”) as a condition of employment. Safety training will be provided as often as necessary and annually at a minimum.

Employer and employee responsibilities are addressed in the SOPs and a designated Safety Coordinator is named as the primary contact for safety-related matters. Regular required safety inspections are required along with respirator use and training procedures.

All facilities will be inspected quarterly by the Facilities Manager to identify potential hazards using the OSHA Self-Inspection Checklist to prevent hazardous material and chemical incidents that could result in injury and/or illness to any employee or visitor.

It is established that requirements of OSHA’s Hazard Communication standard will be met and unit managers are assigned responsibility for conducting job specific hazard training on chemicals used by their employees. After attending training, each employee will sign a form to verify that he or she attended the training and understands the company’s policies on hazard communication.

Copies of Material Safety Data Sheets (“MSDS”) for all hazardous chemicals to which employees may be exposed will be available on the intranet and by hard copy in each chemical storage area of the operating unit in a designated MSDS binder. Sample documents include accident report forms, a safety rule violation notice, and the OSHA Self-Inspection Checklist.

Safety rules addressed include those relevant to accident and hazard reporting, drug and alcohol use, driving, work-related injuries and the required use of Personal Protective Equipment (“PPE”).

Knox Medical will incorporate where appropriate the following OSHA standards in the SOPs for employee safety in our dispensary facilities:

• Potential Hazards: Possible Applicable OSHA Standards:
• Exposure to hazardous chemicals or drugs.
• Hazard Communication Standard.
• Material Safety Data
• Respiratory Protection Standard:

SECTION 16 – SANITATION AND SAFETY
• Exposure to Bloodborne Pathogens such as HIV, Hepatitis B, and C.
• Bloodborne Pathogens Standard:
• Exposure of eyes or body of any person to injurious corrosive materials.
• Medical Services and First Aid:
• Denied right of employee or designated representatives to access relevant exposure and medical records.
• Employee Exposure and Medical Records Standard
• Exposure to wet surfaces and potential slips and falls.
• General Requirements - Walking/Working Surfaces:
• Exposure to latex allergy. Provide alternatives to those employees who are allergic to the gloves normally provided.
• Bloodborne Pathogens Standard:
• Lack of Personal Protective Equipment.
• Personal Protective Equipment:
  • Hand Protection:
  • Eye and Face Protection:

Plans and procedures for complying with OSHA regulations for workplace safety.
• Written warning outlining nature of offense and necessary corrective action with documentation in personnel file.
• Termination.
• Management, including unit managers, will be subject to the above disciplinary action for the following reasons:
  1. Repeated safety rule violations by employees under their supervision.
  2. Failure to provide adequate training prior to job assignment.
  3. Failure to report accidents and provide medical attention to employees injured at work.
  4. Failure to control unsafe conditions or work practices.
  5. Failure to maintain good housekeeping standards and cleanliness in their departments.

EMPLOYEE TRAINING REQUIREMENTS - WORKPLACE SAFETY
Dispensary Managers will include workplace safety training for new employees and update annually. This general safety training may but not be limited to include a review of:
• Personnel accident reporting and investigation policies
• Fire prevention and response plans
• Materials handling and hazard communications policies, including maintenance of material safety data sheets (MSDS) where appropriate
• Personal protective equipment policies where appropriate
• Emergency contacts

SECTION 16 – SANITATION AND SAFETY
VISITOR SAFETY
Knox Medical will maintain all of the public areas of the dispensaries in a safe, clean well lit environment free of any liquids or other hazards to ensure a safe customer experience. The dispensary manager and Assistant Dispensary Manager will be trained in Risk Management protocols in SOPs and will be responsible for the day-to-day supervision of all activities within the dispensary to protect the public from accidental harm. Each dispensary, will also be protected by at least one armed security officer to discourage any attempted theft or other illegal activity. The security officer will remain alert and aware of any potential hazards and inform the Dispensary Manager and Assistant Dispensary Manager of any suspicious activity which may jeopardize the safety of our patients or employees both inside and outside of the dispensary locations. When necessary, the security officer will immediately contact local law enforcement to assess and handle any imminent or active criminal activity. Any incidents of actual or suspected criminal activity will be reported to local law enforcement and the Knox Medical Chief Operating Officer according to the criminal incident report created by the security officer and the Dispensary Manager. If a pattern of criminal activity is suspected or apparent, the Dispensary Manager will request a meeting with local law enforcement and report the substance and results of such meeting to the Department and the Knox Medical Chief Operating Officer.

FIRE SAFETY
Any flammable materials will be not be stored on the premises of a Knox Medical Dispensary. All areas of ingress and egress will be properly signed in accordance with NFPA 704 standards. The facility will comply with all commonwealth and local fire codes. Fire extinguishers will be properly maintained and when possible, fire sprinklers will be installed. All employees will be properly trained in fire prevention and mitigation measures.

CHEMICAL SPILL RESPONSE
All employees will be appropriately trained on spill response. Every employee is responsible for participating in spill response activities. A fully stocked spill kit will be maintained in the facilities. Areas with high spill risk will be stocked with a mobile spill kit for immediate mitigation.
SECTION 17 – RECORDKEEPING

Cansortium Pennsylvania, LLC d/b/a Knox Medical, LLC’s (hereinafter referred to as “Knox Medical”) recordkeeping policies and procedures ensure the maintenance of true, complete, and current records that will be available for inspection by the Department of Health upon request. The Dispensary Manager is responsible for recordkeeping at the dispensing facility level and the Chief Financial Officer is responsible at the executive level.

These policies and procedures have been established to ensure confidentiality and prevent the disclosure of information about qualified patients, designated legal representatives, and employees. All patient records will be handled in a HIPAA compliant manner. Measures for addressing and reporting any loss or unauthorized alteration of records related to medical marijuana products are detailed in the recordkeeping policies and procedures.

RECORDKEEPING SOFTWARE SYSTEMS
In order to ensure accuracy, reliability and redundancy, Knox Medical proposes to use Quickbooks Enterprise and BiotrackTHC. BioTrackTHC enables the business to collect, store, and retrieve all data and activity on inventory and sales; and QuickBooks Enterprise will be used to receive and manage the financial and accounting data from the BiotrackTHC system to verify and audit the sales data and ensure accurate collection and remittance of the Pennsylvania State gross sales tax. QuickBooks Enterprise will also be utilized for usual and customary accounting business management and business forecast function; as well as to generate balance sheets statements, and monthly, quarterly and annual inventory, sales, tax, and profit and loss reports. BioTrackTHC will provide inventory records, patient records, recall reports, sales/transaction records, product disposal records. Additionally, all scanned documents can be accessed at any time (real time), either in-system or through the report creation tool. Though system actions can be adjusted or voided, at no time is any data ever fully deleted as BioTrackTHC maintains a log of every action, including adjustments and voids, so that the entire history of the system may be reconstructed. The availability and reportability of the system data enables Knox Medical to produce any information necessary for an inspection by the Department or law enforcement.

PATIENT RECORDS – HIPAA COMPLIANCE
Information held by the company about qualified patients, designated legal representatives, and employees is confidential and will not be disclosed without the written consent of the individual to whom the information applies, or as required under law or pursuant to an order from a court of competent jurisdiction. However, the Department of Health will be able to access this information on a real time basis to carry our official duties.

The dispensing facility will maintain a transparent and fully accountable set of dispensing facility-related records for internal and external audits, as well as review by the Department of Health. All physical documents, such as patient files, transaction records, inventory records, security records, audit records,
business records, and financial records will be stored electronically in redundant and geographically dispersed Class 5 data centers to provide the maximum level of security and compliance with all state and federal document storage and confidentiality rules, including HIPAA regulations. This method of storage ensures that all records are adequately protected from loss, damage, or unauthorized use.

SALES RECORDS
The Dispensary Manager, in coordination with the Medical Director and on site pharmacist, is responsible for true and accurate records entered and maintained in the BioTrackTHC system. All sales records must record the price of all products sold and comply with all recordkeeping policies and procedures, as well as Department of Health regulations.

Knox Medical will allow the Department of Health or the Department of Health’s authorized representative to examine records that formed the basis for pricing, including books, records, documents, and other types of factual information that inform an adequate evaluation of the cost of goods sold.

Sales records will indicate the name of the certified patient or designated legal representative to whom medical marijuana product(s) has been dispensed. A record of all approved medical marijuana products that have been dispensed must be filed electronically with the Department of Health registry, utilizing a transmission format acceptable to the Department of Health, immediately after the medical marijuana product was dispensed to the certified patient or designated legal representative. The information filed with the Department of Health for each approved medical marijuana product dispensed will include, but is not limited to:

- A serial number that will be generated by the dispensing facility for each approved medical marijuana product dispensed to the certified patient or designated legal representative;
- An identification number that will be populated by a number provided by the Department of Health, to identify the company’s dispensing facility;
- The patient name, date of birth, and gender;
- The patient address, including street, city, state, and zip code;
- The patient’s registry identification card number;
- If applicable, designated legal representative’s name and registry identification card number;
- The date the approved medical marijuana product was filled by the dispensing facility;
- The metric quantity for the approved medical marijuana product;
- The number of days’ supply dispensed;
- The registered practitioner’s Drug Enforcement Administration number;
- The date the written certification was issued by the registered practitioner; and
- The payment method.

When applicable, the company will file a zero report with the Department of Health, in a format acceptable to the Department. A zero report confirms that no approved medical marijuana product was dispensed by
the company during the relevant period of time.

**REPORTING OF RECORDS INCIDENTS**

Any loss or unauthorized alteration of records at the dispensing facility related to medical marijuana products, qualified patients, designated legal representatives, or employees will be reported to the Security Director immediately. The Security Director will then report any such incident to the Medical Director, the Department of Health, and law enforcement as necessary.

**POINT OF SALE SYSTEM**

All inventory and sales will be tracked and reported directly into the BioTrackTHC traceability software platform. This will enable the company to maintain sufficient controls over sales and to prevent unlawful sales or sales over established purchase limits.

One of the significant challenges faced by the medical marijuana industry in providing safe and convenient transactions for patients and caregivers is the lack of access to typical transaction methods. The unavailability of credit or debit card transactions has historically required patients to purchase their medical marijuana products in cash, only increasing public safety risk to the dispensary and the patient and making reliable and accurate recordkeeping challenging. Knox Medical currently uses and proposes to use the Cash4Debit Program wherein patients are not required to use cash as the only method of payment, thus proving a safer experience and improving the accuracy of recordkeeping, state tax collection and auditing. A detailed process flow chart provided by S.P.S. is included below.

**Over-the-Counter ATM Withdrawal Transaction Flow by S.P.S.**

*(Cash4Debit Program)*

- The customer’s VISA/MasterCard being swiped by the teller at the counter;
- Store teller will enter the withdrawal amount requested by the customer;
- Store teller will ask the customer enter their 4-digit pin number on the encrypted pin pad;
- A correct pin number along with the sufficient fund’s available on the account will approve the withdrawal transaction;
- At the moment, S.P.S. bank has already deducted the fund’s from customer's account;
- The store teller will give the customer the dollar amount according to the printed receipt;
- The fund’s according to the printed receipt will be deposited to merchant's bank account.
- S.P.S. will accumulate the transaction fees for merchant throughout the calendar month and credit merchant the total fees on the 15th of the following month.
- S.P.S. will also accumulate the contracted agent’s fees and ACH it into their designated accounts on or about the 15th of the following month.
MAINTAINING A PATIENT-SPECIFIC LOG  
When dispensing medical marijuana products, employees will provide a patient-specific log of medical marijuana products (noting the brand, administration form, dosage, dates dispensed and any return of product) to the patient, the patient’s designated legal representative, if applicable, or the patient’s practitioner upon request.

RECEIPTS  
The employee conducting the sale will provide to the certified patient or designated legal representative a receipt, which will state: the name, address, and registry identification number for the company; the name and registry identification number of the certified patient and the designated legal representative (if any); the date and time of the sale; any recommendation or limitation by the practitioner as to the form or forms of medical cannabis or dosage for the certified patient; and the forms and the quantities of medical marijuana product dispensed. Knox Medical will retain a copy of the registry identification card and the receipt for five years.

TAXES AND SALES ACCOUNTING  
All sales transactions will be subject to applicable sales tax rates. The proper sales tax rates will be programmed into each point of sale system to ensure sales tax is being collected. It is the responsibility of the Dispensary Manager to ensure the proper collection of sales tax on all taxable products sold in the dispensing facility for the jurisdiction.
BIOTRACKTHC

BiotrackTHC’s system has additional capabilities which enhance Knox Medical’s recordkeeping and reporting capabilities. BioTrackTHC’s reporting module can generate daily reports for an establishment’s inventory, acquisitions, harvests, sales, disbursements, and disposals. These records are kept indefinitely. Whether the establishment is harvesting or receiving product from another establishment, the system can keep full record of who is providing the medical marijuana and/or marijuana infused products. The system will keep a record of the following, and much more; dates of transfers and transactions, batch numbers, quantity, product weight, usable amount in each infused product, and the patient’s registration card number. These records can be pulled up for any time period in the reporting module.
The BioTrackTHC system comes preloaded with over 140 industry-specific reports developed over years of feedback and experience from cannabis business operators in both the medicinal and adult-use (recreational) cannabis markets. License holders have the ability to create their own customized reports specific to their workflow or standard operating procedures. If the license holder prefers, the BioTrackTHC team can build the custom reports for them at an additional charge. The reporting functionality from the system allows the license holder to pull reports regarding supply chain, employee actions, quality control, destruction, transportation, and various other events that take place within the processes of the cannabis industry.

As stated above, Knox Medical currently operates a sophisticated, reliable and redundant recordkeeping system which prioritizes and enhances patient privacy, safety and convenience, while ensuring accurate recordkeeping to prevent diversion and enhance accuracy and reliability for Department investigations and auditing.

**BIOTRACKTHC – RECORDKEEPING**

BioTrackTHC’s reporting module can generate daily reports for an establishment’s inventory, acquisitions, harvests, sales, disbursements, and disposals. These records are kept indefinitely. Whether the establishment is harvesting or receiving product from another establishment, the system can keep full record of who is providing the marijuana and/or marijuana infused products. The system will keep record of the following, and much more; dates of transfers and transactions, batch numbers, quantity, product weight, usable amount in each infused product, and the agent’s registration card number. These records can be pulled up for any time period in the reporting module.
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As evidence of Knox Medical’s ability to immediately provide safe, secure, and reliable transaction services to the residents of Pennsylvania, please see the bank letter included in Exhibit 10 by the Mid Penn Bank of Pennsylvania which confirms our relationship. Mid Penn will be integrated with our card processing platform to avoid cash transactions and improve the reliability and accuracy of our financial recordkeeping.
SECTION 19 – BUSINESS HISTORY AND CAPACITY TO OPERATE

Knox Medical, operating in Florida as an approved dispensing organization under the Florida Department of Health, has been the result of a joint venture between Cansortium, LLC and Knox Management Services. Since early 2015, the business planning and build out of required capital expenditures has been funded by the equity management company of Cansortium Holdings, LLC. It is this equity management company that will be a significant partner in the application for licensing of a Cultivation and Processing license in the state of Pennsylvania.

Henry Batievsky and José Hidalgo jointly established Cansortium Holdings LLC. Together, they successfully led the licensing and financing effort in Florida for Knox Nursery, which was awarded one of the initial five, limited, and merit-based medical cannabis licenses in that state.

Henry received a BS in Economics from the University of Pennsylvania Wharton School of Business, and a JD from the University of California at Los Angeles. He began his career as a tax attorney at Paul, Weiss, Wharton, Rifkind & Garrison LLC, where he focused on major corporate mergers and acquisitions. José worked with one of the nation’s largest mortgage companies in a senior executive role and in September 2013, together they founded Habitribe LLC. Their combined experience and success have established their role as thought leaders in the real estate space. This diverse background has allowed them to establish a national network of professionals that ultimately evolved into a SEC Fund for Accredited Investors. They have developed and executed innovative strategies in mortgage banking and managed bank operations for the disposition of distressed properties for some of the largest banks and mortgage firms in the U.S. They are often invited to serve on panels and deliver presentations at Private High Net Worth investor symposiums across the country.

They first applied these skills to the medical cannabis industry in 2014 by investing in a Colorado-based operation. Along with Jeffrey Reath as part of their team, they were later instrumental in establishing a financing deal for one of the few licensed cultivators in Canada. These successful businesses resulted in an increased involvement with medical cannabis ventures in various U.S. markets. The team that has been developed in Cansortium Holdings, LLC is now an industry expert, highly sought after for their depth of understanding in the various aspects of this evolving industry.

Cansortium Holdings, LLC has built an accomplished team comprised of legal, government affairs, investor relations, public affairs, real estate, and horticultural experts. They have established key relationships with existing cannabis market leaders in cultivation, processing, and dispensing, along with analysts already successful in other jurisdictions. With the implementation of a national branding strategy, Cansortium Holdings, LLC successfully led the licensing and financing effort for Knox Nursery of Winter Garden, Florida. This team delivered the strongest overall score during the process and he has guided the development through the strict and ongoing multifaceted approval steps required by Florida authorities.

As part of a developing branding strategy, it was determined that multiple actions in multiple jurisdictions would be required. Not only does this provide a strong brand to build a capacity around, it provides deeper understanding and knowledge amongst other industry groups.
Cansortium Holdings, LLC was approached by a group from Puerto Rico interested in applying for Cultivation and Processing licenses. The team at Cansortium Holdings, LLC was able to develop dependable relationships with legal and governmental services groups in Puerto Rico. These efforts resulted in the highest scored application in Puerto Rico and one of three original Cultivation and Processing licenses. This was quickly followed by a dispensing license as well in Puerto Rico.

Throughout the past 2 years of operations, Cansortium Holdings, LLC has employed segregated strategies to ensure different aspects of the business plan can be actuated and efficiently developed. Cansortium Holdings, LLC has successfully managed 5 distinct rounds of investor funding. As a result, all operations have been financed without the need for debt, which results in a strong understanding of how to build a business in a difficult banking environment.

To date, Cansortium Holdings, LLC has raised $11.3M in equity contributions and had secured an additional $3M in collateral for bonding purposes for the Florida license requirements. This capital raise has been completely within the lines of what was projected to be required in early 2015. As of now, Cansortium Holdings, LLC is in a revenue stage from the operations in Florida. In Puerto Rico, the stage of development is on time and within budget as well.

The strategy of raising capital as required to meet Capital Expenditures and Operating Expenditures has allowed Cansortium Holdings, LLC to remain committed and focused on the capabilities of the team. Cansortium Holdings, LLC has not been forced to bring in outside investor groups that may or may not share the vision of building a superior medical product and developing the Knox Medical brand. Many other operators throughout the United States face competing visions and realities. Rarely is an outside investor group concerned about the quality of the product, rather it is the return on investment that drives them.

During much of 2015, Cansortium Holdings, LLC developed and conceptualized what would be needed in order develop the best in brand approach that is evident today in the Florida and Puerto Rico markets. It was during this period that Cansortium Holdings, LLC secured the services of award winning advertising and branding experts. Cansortium Holdings, LLC envisioned a modern, sleek and professional image that will provide the correct message that Cannabis is a Medicine. Cansortium Holdings, LLC has always been mindful that the proper relationship between their operations and the expectation of the State rests on the quality and experience of the patients resident in the State.

Cansortium Holdings, LLC has striven to give assurances as well to the local municipal and county administrations about the quality of their operations along with the image of the Knox Dispensary approach. Although the principals of Cansortium Holdings, LLC has a significant background in real estate, it was decided in mid 2015 that the use of a full suite of experts contained within a real estate management company was the best route to follow. This relationship ensured location demographics, zoning and bylaws, retrofit design elements and continuity of appearance were professionally managed. As a result, the Knox Medical branded dispensaries are opening in 6 locations across Florida to a great deal of media and public interest.
Financial planning during 2015 resulted in a 5 year pro forma that was designed to approximate the required investment dollars to be deployed as well as a potential capital budget for the construction of a state of the art cultivation facility. Where many other licensees in nearly all current jurisdictions decided that an indoor, factory style growing environment was the acceptable course, Cansortium Holdings, LLC with Knox Nursery developed a full light deprivation style greenhouse. As a result, the balance of 2015 was spent in developing a best in class style approach to building this style of greenhouse.

By incorporating new technology and advances in humidity and water control, Cansortium Holdings, LLC believed in the fact that the higher Capital Cost of this approach would be offset by better quality of plant at a lower operating cost. This combination then allows for better medicine due to greater oversight and testing during the production phase. If all businesses are constrained in how much they can spend during the supply stage, it makes sense that with higher daily operating costs, there is less available for quality control and safety considerations. Cansortium Holdings, LLC has remained true to the idea that investing early into the right solution will provide superior outcomes.

Once awarded a license in late 2015, the focus of Cansortium Holdings, LLC was shifted from the planning stage to the actuating of the plan. Through early 2016 temporary growing facilities were designed and put into place to begin cultivation runs. These same, fast start, growing containers will be available to be deployed into Pennsylvania. They are mobile and easily managed, which allowed Cansortium Holdings, LLC to begin producing raw plant material to be used as the actual production facility was being designed.

Early to mid 2016 the team at Cansortium Holdings, LLC began developing packaging and delivery methods that would be employed as dispensing activities would ramp up later in the year. The same design considerations were applied here as before to the cultivation and dispensing design elements. All packaging takes into account the message that is important to the State; Cannabis is a Medicine. Cansortium Holdings, LLC has taken the steps to ensure all the ensemble effect ingredients are listed, and understood. Naming conventions were developed as well as dosing strengths to build an awareness within the medical community that is designed to build confidence and acceptance with physicians.

During this same time period, applications were being submitted to Puerto Rico. The team approach of Cansortium Holdings, LLC was able to keep developing operations in Florida on track and still deploy the needed capacity to best understand the unique aspects of the Puerto Rico marketplace. Land selection, nursery partnerships and dispensary strategies were all evaluated during the middle of 2016. With the past success in Florida as a guide, Cansortium Holdings, LLC was in fact able to apply for and receive the highest mark in Puerto Rico. From mid 2016 to the 4th quarter, Cansortium Holdings, LLC continued to develop their operational capacity, now in two separate and distinct legislative markets. In Florida, the focus was on building a 9,000 square foot production facility. Drying rooms, cutting stations and storage facilities were built that will handle a patient base of over 130,000. State of the art testing and extraction rooms were built and outfitted with all the equipment needed to ensure the best quality product would be made available to the residents of Florida.
SECTION 19 – BUSINESS HISTORY AND CAPACITY TO OPERATE

The same attention to detail as in all earlier stages was employed throughout this period of time. Monitoring, security and employee tracking solutions were developed to ensure a superior quality control. Cansortium Holdings, LLC also identified that existing technology in the marketplace for extractions processes was not optimal. Human error and potential for contamination were too high to be acceptable from the perspective of the Knox brand. This led to the custom design and manufacturing of a new CO2 extraction process and equipment. As a result, with full automation of all processes and multiple choices in batch sizes, Cansortium Holdings, LLC is able to be at least 50% more efficient in this very critical process. This efficiency further augments the fact that underlying operating costs are reduced further, resulting in greater resources devoted to the security and testing of the medical end product.

During this same period of time, the site plans and Capital Expenditures in Puerto Rico were maximized. Partnering with a successful nursery operation provided a superior location for climate control and access. Improvements were carried out on road way access, location pads, rain and surface water control and site security. A similar approach was then employed here as was done in Florida, self-contained, fast start temporary cultivation facilities were planned for and ultimately deployed.

During the last quarter of 2016, Cansortium Holdings, LLC continued to raise capital as required, oversaw the Florida production facility completion and situated the temporary facilities in Puerto Rico. Cansortium Holdings, LLC also turned their attention to developing and testing a number of Intellectual Properties and Information Technologies. These are all solutions designed to educate and enhance the relationships with patients and their physicians. Cansortium Holdings, LLC identified that many physicians are uncomfortable in this new medical field due to lack of knowledge and understanding of the myriad of strains, dosages, delivery methods and symptom control. Cansortium Holdings, LLC, by using experts in IT and IP design, has developed a multi-platform, user driven, physician controlled program that will help eliminate the concerns for physicians and patients alike. This will facilitate a proactive approach to the use of medical cannabis.

In late Autumn of 2016, Cansortium Holdings, LLC oversaw the building of the 35,000 square foot cultivation facility first envisioned in 2015. The cultivation and harvest facility of Knox Medical is capable of providing required medicine to over 74,500 patients per year in Florida alone. Proprietary design elements minimize direct handling of plants, thereby reducing contamination percentages and stress on the developing greenery. Low labor interactions and costs, coupled with high output was the initial goal of Cansortium Holdings, LLC, which has now been achieved. This reduces the underlying production costs as indicated earlier in this narrative. Newly engineered humidity control systems and water and effluent controls will provide further savings on operations, while ensuring a more healthy and sustainable crop management. Proprietary RFID technology with over 15 years of high volume testing and proven usage is being incorporated into cultivation to dispensing phases of Knox Medical. This technology not only provides for security from a licensing point of view, but it builds consumer confidence and gives the Department of Health assurances that the medicine provided to patients can be traced and tracked from the very first clone to delivery of finished medical products.
In late 2016, Knox Medical began to dispense medical cannabis to qualified patients. Each week since this period there has been an exponential growth in patient numbers and dispensed medicine. Dispensaries are being finalized and opened in the 1st quarter of 2017, along with a strategic expansion if additional dispensaries in new areas over the remainder of the year. In Puerto Rico, the permanent cultivation facility is in the early stages of construction. Once complete, the expectation is to begin processing the early cultivations from the temporary facilities and begin dispensing by end of the 2nd quarter in 2017.

Throughout the past two years, Cansortium Holdings, LLC has provided access to legislators and news outlets to better understand the capabilities of not only the Knox Brand, but the industry as a whole. Cansortium Holdings, LLC believes that by ensuring a best in class product, while being a leader in the advocacy and cooperation within the industry, patients and physicians will receive the support and understanding required to bring relief of many medical conditions. This included taking a leadership role in working with various patient advocacy groups as well.

Throughout the two years of operations for Cansortium Holdings, LLC has demonstrated leadership while always ensuring their operational capacity remained on track. The result is an innovative approach to all aspects of planning, design, implementation and end results. This industry has the unfortunate reality, for the most part, where old processes are forced into new markets. Cansortium Holdings, LLC believes that each market is unique. The needs of Pennsylvania and the patients therein deserve to have best in class production of cannabis based medicine. This concept will be uppermost in the planning and implementation strategies from the very beginning.

Cansortium Holdings, LLC will continue to work with experts in their fields, local business partners and State officials to ensure at all times the best possible quality product will be made available. Although past performance is not always an indication for future success, Cansortium Holdings, LLC has proven itself capable of envisioning and actuating complex and multi layered solutions. As indicated earlier, this resulted in the highest scoring applications in two jurisdictions so far. However, and more importantly, Cansortium Holdings, LLC continues to exceed expectations and has delivered on their proposed operational capabilities.
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**SECTION 21 - OWNERSHIP**
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</tr>
<tr>
<td>Mr.</td>
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COMMUNITY IMPACT STATEMENT – REGION 6

Application Type: Dispensary
Pennsylvania Region: 6
Site Location: 3857 Peach Street, Erie, PA 16509

OUR COMPANY

Cansortium Pennsylvania, LLC d/b/a Knox Medical, LLC (hereinafter referred to as "Knox Medical") Knox Medical is committed to providing safe, secure, and convenient access to medical marijuana patients at our dispensaries for all Pennsylvanians with a focus on the highest level of customer service while respecting their right to privacy.

Knox Medical currently operates dispensary facilities in Florida and is constructing additional facilities in Puerto Rico. We’ve assembled the top team of experts in this field to achieve the highest results for patients in Pennsylvania who deserve healing, therapy, and access to care. Quality and safety remain our highest priorities and our patients deserve only the best. Please see the enclosed photograph of one of our completed dispensaries which demonstrates our commitment to a superior patient experience while creating a positive aesthetic environment for the surrounding community.

OUR MISSION

To compassionately provide patients access to the highest level of Medical Marijuana Products in an unrivaled, professional healthcare environment. Patient care always comes first at Knox Medical and our standards, practices, and performance is unmatched.

COMMUNITY INFORMATION

Erie /ˈɛri/ is a city in and the county seat of Erie County, Pennsylvania, United States. Named for the lake and the Native American tribe that resided along its southern shore, Erie is the fourth-largest city in Pennsylvania, as well as the largest city in Northwestern Pennsylvania, with a population of 101,786 at the 2010 census. The estimated population in 2016 had decreased to 100,055. The Erie metropolitan area, equivalent to all of Erie County, consists of 278,045 residents.
Erie is situated between Buffalo, Cleveland, and Pittsburgh. Erie's manufacturing sector remains prominent in the local economy, though health care, higher education, technology, service industries and tourism are emerging as greater economic drivers.

Over four million people visit Erie during summer months for recreation at Presque Isle State Park, as well as attractions like an indoor water park, Waldameer Park, the casino and horse racetrack named for the state park.

Erie is known as the "Flagship City" because of its status as the home port of Oliver Hazard Perry's flagship Niagara. The city has also been called the "Gem City" because of the sparkling lake.

Erie won the All-America City Award in 1972, and in 2012 hosted the Perry 200, a commemoration, celebrating 200 years of peace between England, America and Canada following the War of 1812 and Battle of Lake Erie.

**WORKFORCE, EMPLOYMENT AND INCOME**

Both Erie County and Erie City have slightly below average labor force participation rates at 62.1% and 60.7%, respectively, when compared to Pennsylvania’s rate of 62.8% and the US’s rate of 63.7%.

The unemployment rate for the County and the City, at 8% and 10%, are near the state and national unemployment rates of 7.9% and 8.3%, respectively.

The median household income for the County and the City are comparably low, and significantly so for the City. The City’s median household income of $34,253 lags that of the County ($45,971), which is likewise below the state median household income of $53,599 and the national rate of $53,889.

These factors illustrate the difficulty Erie County and City have had in transitioning from a primarily industrial economy to one based upon services. As such, a medical marijuana dispensary will be an asset to the community, as it will draw dollars from the surrounding municipalities and counties into the City of Erie.

**LIVING WAGE**

Knox Medical commits to pay each employee at least a “Living Wage”, currently $15.00 per hour minimum and will always have the employee’s best interest in mind. Knox Medical is open to entering in to any potential Labor Peace Agreements labor unions in the community.

**NEW EMPLOYMENT OPPORTUNITIES AND LOCAL PAYROLL IMPACT**

Each Knox Medical dispensary will hire at least eight (8) full time employees: two (2) senior level management with an average annual income of at least $60,000 a year plus
benefits, two (2) mid-level facility managers with an average annual income of at least $45,000, two (2) customer service representatives with an average annual income of at least $45,000, and two (2) drivers with an average annual income of at least $40,000 for total estimated annual salaries of at least $380,000 per dispensary. All full-time employees will receive usual and customary employee benefits including health care, sick leave, and maternity leave and be eligible to participate in the Knox Medical retirement program.

POPULATION DISABILITY PREVALENCE

The disability rate of Erie County and City are 14.6% and 17.4%, respectively. These rates are higher than the state (13.5%) and the nation (12.4%) as a whole, which demonstrate the community’s higher-than-average need for medicinal marijuana.

Locating a dispensary in the area will offer easy access to a valuable medication for a population that is more disadvantaged than the state and nation as a whole.

While operating in our locations outside the State of Pennsylvania, Knox Medical has seen first-hand the economic struggles of some patients in being able to afford their medical marijuana products. Therefore, Knox Medical has implemented a Patient Assistance Program (PAP) wherein patients can apply for up to a 20% discount on the purchase price of their medical marijuana products. Knox Medical proposes to use the same PAP in Pennsylvania at all of our dispensary locations and will work with our local community advisory group to solicit input on where and how the benefit levels should be set in relation to local income standards. Current PAP eligibility for our other programs begins at a stated income level of 150% of the poverty level.

COMMUNITY OUTREACH

Knox Medical has a keen understanding, if we are fortunate enough to be selected to provide medical marijuana products and services to Pennsylvania residents, that one of our roles is to reach out to the local community to provide education about our products, activities, and medical marijuana in Pennsylvania generally. In order to facilitate this process, Knox Medical has retained the services of DTI Development Inc. to assist in the execution of the community outreach process. Please see the corporate history and experience of DTI Development Inc. at the end of this section.

Activities to be included in the Knox Medical Community Outreach Plan will include but not limited to the following:

- the designation of one (1) senior manager as the community outreach coordinator and provide a phone number and email address to distribute at all meetings and events and clearly posted on the company website and any social media
- hold meetings with all elected officials within the local jurisdictions where Knox Medical will operate
• schedule and promote community workshops to receive input from the community about their concerns, and to educate the community about what activities will, and will not, be taking place as part of Knox Medical’s operations within the community

• schedule and promote hiring fairs for the local residents for employment opportunities with Knox Medical coordinated with local unions, workforce agencies and

• develop no cost job training programs with local unions and educational institutions to implement employee training programs for all potential job classifications in the medical marijuana industry. Upon completion, the student will receive a certificate for each job category in which they are trained

• join and participate in local Chambers of Commerce and business clubs to promote integration with the local business community and promote “Local Business First Spending Programs” to seek out local vendors for products, goods, and services Knox Medical can procure from the community.

• meet with local media and Editorial Boards for informational sessions and dialogue about Knox Medical story, our local management and plans for activities in the community-please see Exhibit 14 for a library of newspaper articles and other media covered generated by our existing community outreach activities in our other markets.

The initial set of community leaders for the Allentown outreach include but are not limited to:

**Community Leaders**

**Mayor**
Joseph Sinnott
Room 500
626 State Street
Erie, PA 16501
Phone (814) 870-1204

**City Council Members**
Casimir Kwitowski, President
Sonya Arrington
David Brennan
Curtis Jones
Robert Merski
James Winarski
Melvin Witherspoon
COMMUNITY OUTREACH AND EDUCATION MATERIALS

Knox Medical understands that Pennsylvanians still have many questions about what is, and what is not, permitted under Pennsylvania law for the growing, processing, and distribution of medical marijuana products. As part of our community outreach activities, Knox Medical will only include advisory bulletins provided by Pennsylvania Department of Health such as the following Legislative History and Frequently Asked Questions (FAQs) in our community outreach communications.

Pennsylvania Legislative History

Senate Bill #3 - An Act establishing a medical marijuana program; providing for patient and caregiver certification and for medical marijuana organization registration; imposing duties on the Department of Health; providing for a tax on medical marijuana organization gross receipts; establishing the Medical Marijuana Program Fund; establishing the Medical Marijuana Advisory Board; establishing a medical marijuana research program; imposing duties on the Department of Corrections, the Department of Education and the Department of Human Services; and providing for academic clinical research centers and for penalties and enforcement.

On April 17, 2016 Gov. Tom Wolf has signed Senate Bill #3 legalizing medical marijuana in Pennsylvania into law. The bill went into effect May of 2016. It has been estimated that 100,000 to 200,000 Pennsylvania residents will seek medical marijuana.

Use of Medical Marijuana

People have used marijuana, also called cannabis, for a variety of health conditions for at least 3,000 years. The U.S. Food and Drug Administration (FDA) haven’t found that marijuana is safe or effective for treating any health problems. However, some states and the District of Columbia allow its use for certain health purposes. States have legalized medical marijuana because of decisions made by voters or legislators—not because of scientific evidence of its benefits and risks.

It’s challenging to study the health effects of marijuana because of legal restrictions and variability in the concentration of the plant’s psychoactive chemicals. However, recently the Federal Government eased some research restrictions and also began providing researchers with more strains of marijuana. Currently, the quality of health research on marijuana and its components (other than two FDA-approved medications) varies widely by disease.

The National Institute on Drug Abuse (NIDA) has more information on many aspects of marijuana; including how likely people are to abuse it and how chemicals in marijuana affect our brain and body.

According to WebMD, the more recent research includes 13 studies done at the University of California in San Diego between 2000 and 2010. The conclusion was that chemicals contained in marijuana might be useful medicines for some conditions, and
deserve further research. Since the 1960s, a great deal of research has taken place in Israel, where medical marijuana is legal, and where doctors, and the government, believe marijuana has assorted proven medical benefits. Many medical organizations have taken a stance on medical marijuana, and their positions vary. For example, the Pennsylvania Medical Society, which represents doctors, opposes legalizing medical marijuana at this point, citing lack of research. However, the medical society favors removing marijuana from Schedule I, to open the door to more research. The Pennsylvania State Nurses Association supports the legalization bill. At a recent local forum on the subject, Dr. Robert Campbell, the president of the Pennsylvania Society of Anesthesiologists, said doctors presently have no way of knowing exactly what marijuana does inside the body, or even what dose would be appropriate. Dr. William Trescher, the director of pediatric neurology at Penn State Milton S. Hershey Medical Center, acknowledged a shortage of conventionally-accepted studies, but argued there are sufficient studies, along with the experiences of many people, to warrant making marijuana available as a medicine. Trescher treats children with severe seizures which can't be controlled with approved medications, and who suffer dangerous side effects from those powerful drugs. He believes parents of those children need the option of trying medical marijuana-derived treatments, which seem to be helping some children in Colorado.

QUESTIONS ABOUT MEDICAL MARIJUANA LEGALIZATION

Below are the most popular questions that were asked during the formation of the senate bill legalizing medical marijuana in the state of Pennsylvania. As we are committed to the community and to answering all of their concerns we have included responses.

How will Patients be approved?

Under Pennsylvania's new law, doctors and patients must first register with the state before participating in a treatment program. The patient will need to have one of the 17 approved medical conditions, which include cancer, HIV/AIDS, ALS, Parkinson's disease, multiple sclerosis, epilepsy, Huntington's disease, Crohn's disease, chronic pain, PTSD, sickle cell anemia and autism. They will need a recommendation from a physician who has registered with the state and received training, and a card from the state. The card will enable them to get medical marijuana at a dispensary.

Would children being treated for seizures be given marijuana to smoke?

At least at the beginning, medical marijuana can be dispensed in forms including pills, creams and oils, including forms that could be vaporized or converted to edible forms. Smoking of medical marijuana wouldn't be allowed, nor will be available in leaf form. However, the advisory board could eventually make changes based on new research and developments.
What would prevent medical marijuana from being used by people who aren't sick and just want to get high?

People under the treatment of a doctor who believes medical marijuana is appropriate for them would obtain a medical cannabis card. Growers, processors and dispensers would be licensed, and their employees would be certified. Presumably, this would allow people who possess marijuana for non-approved purposes to be prosecuted.

Where would the medical marijuana come from?

The first phase of the rollout will see the issuance of 12 permits for growers and processors of cannabis and 27 permits for dispensaries to distribute medicine to registered patients.

Both growing and dispensing operations will be spread across the state, in six regions designated by the state. The region that includes Harrisburg, for example, will see four dispensaries and two grower/processors.

The state will initially license up to 25 growers/processors and 50 dispensaries, with dispensaries allowed to have up to three locations.

Would medical marijuana be taxed?

Grower/processors will have to pay a 5 percent tax, but the law says the tax can't be passed to patients or caregivers.

The money will be used for things including administering the program, providing grants to police departments to fund program-related local enforcement, funding research on medical marijuana, and making sure medical marijuana is accessible to the poor.

Would medical marijuana be covered by health insurance?

Probably not. Medical marijuana isn't approved by the U.S. Food and Drug Administration, which makes unlikely it would be a covered drug on health insurance plans.

Are the Programs uniformed from state to state?

Pennsylvania will join 23 other states that have legalized medical marijuana for a list of conditions. But states' programs aren't uniform, with some states allowing for smaller lists of conditions and some running into roadblocks which have limited availability.
THE POSITIVE COMMUNITY IMPACT OF LEGALIZING MEDICAL MARIJUANA

Legalizing medical marijuana will reduce state spending.

The cost of battling marijuana distribution and possession is exorbitant. By legalization for medicinal purposes, producers of marijuana can opt to sell the cannabis through legal channels and do not need to be caught, prosecuted, or jailed—all things that require taxpayer’s money.

Legalizing medical marijuana will increase state revenue.

Having it a legal product, the government can tax the marijuana and increase state revenue.

More money for other sectors

The money that the state government saves from not having to enforce laws to prohibit marijuana, along with the extra tax income from legal sales, can be allocated to more important sectors like education and health—i.e. better management of funds, better economics.

CREATION OF THE KNOX MEDICAL FOUNDATION

As part of our commitment to the communities throughout the state of Pennsylvania, Cansortium PA has formed the Knox Medical Foundation of Pennsylvania which shall support efforts that strengthen the ability of communities surrounding the Allentown Facility to determine their own economic, health and social well-being, and that help people control those forces that affect their lives. These efforts may promote programs to: advance drug and mental health treatment/awareness programs; create economic opportunities and development through job training programs; provide small business support grants; and support critical community need efforts (as determined by the Foundation grant committee). Cansortium PA will commit to fund the Foundation with a minimum annual funding level of $100,000.00. The Foundation shall create a grant committee that shall include representatives from the following: Lehigh County Economic Development Authority; Allentown (as designated by the President of Council); drug treatment / prevention professional based in Lehigh County; mental health professional based in Lehigh County; job training professional (community college or vocational school) based in Lehigh County; additional community representatives as deemed beneficial to the Foundations objectives; and representatives of Cansortium PA.

DTI DEVELOPMENT EXPERIENCE
DTI Development Inc. (DTI) was founded in 2007 by Dennis Troy, a 20 plus year veteran in the economic development industry. DTI Advisory Group was founded in 2013 by Dennis Troy, a registered Pennsylvania Lobbyist since 2004 as a means to provide governmental affairs services to its clients. The successful track record of DTI and DTIAG and its principals includes work from both the public and private sectors. Mr. Troy served as a Director and Deputy Director of Economic Development for Allegheny County where he was responsible for a number of high profile projects. A sample of Mr. Troy’s public sector accomplishments includes:

- The mixed use development of a 300 acre site known as The Waterfront in Allegheny County’s Mon Valley.
- The redevelopment of a 10 acre mixed use site known as Brentwood Town Square.
- Serving as the lead representative for Allegheny County during negotiations and financial packaging of projects involving new sports venues for the Pittsburgh Steelers and Pirates.
- Overseeing the staffing of the Southwestern Pennsylvania Convention Center Design Commission which headed the design of the expanded David L. Lawrence Convention Center.

Mr. Troy continues to foster and cultivate his network of professionals and public officials both locally and nationally. He has continued his successful management of responsibilities assigned by the firm’s clients. DTI is proud to have completed work on numerous projects throughout Pennsylvania that range from developing riverfront walking trails to project management of large scale multi use real estate development projects. For example, in May 2009, the Cork Factory Lofts project that Mr. Troy has represented since its groundbreaking was named the Best Redevelopment Project in the United States by the Urban Land Institute.

A small sampling of DTI’s current project activity includes serving as the Owner’s Representative for the construction of one of the nation’s first LEED Certified Trucking and Maintenance Facility project for Pitt Ohio Express, Grants Administrator for a $15 million RACP award for the redevelopment of 55 acres in Pittsburgh’s Strip District, special projects administration for the Urban Redevelopment Authority of Pittsburgh as well as providing grant administration and Government Relations assistance for the UCP/CLASS. UCP is one of the largest non-profit organizations in Western Pennsylvania serving nearly 4,400 disabled individuals.

DTI is recognized for its ability to work with a variety of projects and in support of a number of important legislative policy matters. With a respect for and a strong understanding of the funding challenges faced by both the public and private sectors, Mr. Troy has established himself as a credible resource for economic development efforts. Furthermore, this credibility and the relationships it has forged both locally and statewide, DTI provides its clients the top notch service they deserve.

In addition to Mr. Troy, the following DTI and DTIAG Staff will work with Franklin Square Capital Partners in our efforts:

**Albert Payne, Vice President**
Mr. Payne is a partner and Chief Financial Officer of DTI. He applies his over 25 years of Accounting, Business Management and Development experience working with diverse organizational structures including Public & Private, Profit & Not-For-Profit, Educational, Start-Up and Early Stage Companies. Public Accounting Firm experience as a Business Enterprise and tax structuring Consultant working with full stage audits, reviews and compilations, international, federal, state and local tax compilations and consolidations, construction development loan/cost certifications/reconciliations. Mr. Payne has extensive knowledge with investment policy and procedure development along with fiduciary trust management.


Some of the prominent projects in the Pittsburgh area that Mr. Payne has been associated with include Carnegie Mellon University, University of Pittsburgh, Bayer, Greentree Sportsplex, Ardex, W.W. Henry Adhesives and Rosedale Technical Institute.

**Dennis Coxon, Associate**  
Dennis has been with DTI for nearly 2 years and provides direct assistance in compiling information and preparing the requisite applications, forms and submittals for the economic development programs for which we apply. Dennis is currently completing coursework towards a graduate degree at the University of Pittsburgh’s Graduate School of Public and International Affairs.
Please note that the compliance process outlined above with the exception of the BDISBO Prime Contractors, Quarterly Utilization Report is proprietary information and property of Knox Medical and its Consultants.
Section 4 - A. Principals, Financial Backers and Operators

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<tr>
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<td>Principal</td>
<td>123-456-7890</td>
<td><a href="mailto:johndoe@email.com">johndoe@email.com</a></td>
<td><a href="mailto:john.doe@principals.com">john.doe@principals.com</a></td>
<td><a href="http://www.principals.com">www.principals.com</a></td>
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<tr>
<td>Jane Smith</td>
<td>Financial Backer</td>
<td>987-654-3210</td>
<td><a href="mailto:janesmith@email.com">janesmith@email.com</a></td>
<td><a href="mailto:jane.smith@backers.com">jane.smith@backers.com</a></td>
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<tr>
<td>Mike Brown</td>
<td>Operator</td>
<td>456-789-0123</td>
<td><a href="mailto:mikebrown@email.com">mikebrown@email.com</a></td>
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<td>Sarah Lee</td>
<td>Principal</td>
<td>210-321-4356</td>
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<tr>
<td>David Kim</td>
<td>Financial Backer</td>
<td>543-678-9012</td>
<td><a href="mailto:davidkim@email.com">davidkim@email.com</a></td>
<td><a href="mailto:david.kim@backers.com">david.kim@backers.com</a></td>
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<tr>
<td>Emma Chen</td>
<td>Operator</td>
<td>135-246-0987</td>
<td><a href="mailto:emma.chen@email.com">emma.chen@email.com</a></td>
<td><a href="mailto:emma.chen@operators.com">emma.chen@operators.com</a></td>
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## Section 4 - A. Principals, Financial Backers and Operators

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SECTION 9 – A. DESCRIPTION OF DUTIES

Chief Cultivation Officer

The Chief Cultivation Officer (CCO) is responsible for all aspects of the cultivation of medical marijuana. In this capacity, the CCO directly supervises the General Manager of the facility, the Operations Director and the Processing and Extraction Director. The CCO is additionally responsible for supervising quality control personnel in the growing and extraction processes to ensure no contaminants or mold are present or develop during the harvesting, storage and processing activities. At an executive level, the CCO coordinates with the Chief Operating Officer the Compliance Officer, Security Director and Medical Director when necessary and appropriate.

Medical Director

Holds the senior medical administrative position Knox Medical. Responsible for a number of activities related to the dosing and dispensing of medical marijuana and clinical services such as cost management, utilization review, quality assurance, and medical protocol development. Oversees the activities of the pharmacist and works in coordination of the Chief Cultivation Officer Reports to the Chief Executive Officer Directorship duties and responsibilities: Attend standing meetings, Develop and manage a budget, including presenting monthly financial reports to practice staff with the support of administration, Monitor quality and appropriateness of medical marijuana product, Provide guidance and leadership for performance guidelines, Develop policies and procedures, and Manage strategic development.

Security Director

The Security Director is required to ensure the security of equipment, information, and personnel of Knox Medical from fraud, internet hacking, physical assault, industrial espionage, terrorism, robbery, among other threats. They plan, direct and monitor the implementation of security systems for protection of industrial and commercial operations. The Security Director is also responsible for hiring, training and supervising new employees who would be a part of the department of security and safety. They plan, direct and coordinates activities relating to the protection, safeguarding and security of company assets, employees, invitees and others; Ensures that established goals and objectives are accomplished with prescribed priorities, time limitations and with fiscal responsibilities; Advises, makes recommendations, assists in the formulation of goals and objectives; Designs, implements and monitors security policies, procedures and programs analyzing data of internal operations. Investigates incidents that may violate company procedures or that may constitute a criminal violation. Complies with federal, state and local legal regulations, including reporting criminal information to authorities; and Exercises independent judgment in the course of carrying out overall responsibilities and other activities as assigned.
**Operations Director**

The Operations Director is primarily responsible for overseeing the daily cultivation activities, monitoring of inventory and other activities necessary to support the final processing, bottling, labeling and delivery of medical marijuana products. The Operations Manager in conjunction with the General Manager and the Security Director oversee the Diversion Prevention Plan. Additionally, the Operations Director oversees the recordkeeping procedures in conjunction with the Inventory Manager. The Operations Manager reports directly to the CCO and coordinates their activities with the General Manager and jointly supervises the Inventory and Production Manager and the Cultivation Manager.

**General Manager**

The General Manager is primarily responsible for overseeing the daily activities of the facility and the facility support staff and supervising all aspects of the day-to-day operations of the facility, including the sanitation and safety plan, the security and surveillance equipment and assisting in the supervision of the security guards, in coordination with the Security Director. The General Manager in conjunction with the Operations Manager and the Security Director oversee the Diversion Prevention Plan. The General Manager reports directly to the Chief Cultivation Officer and coordinates their activities with the General Manager and jointly supervises the Inventory and Production Manager and the Cultivation Manager.

**Processing and Extraction Director**

The Processing and Extraction Director is primarily responsible for all aspects of processing medical marijuana. As part of their responsibilities, the Processing Director oversees the development of processing plans, strategies, selection of equipment, quality monitoring and product testing to ensure high quality and consistent results. The Processing and Extraction Director reports to the CCO and coordinates with the Operations Director and General Manager when necessary and appropriate.

**Cultivation Manager**

The Cultivation Manager is responsible for all day-to-day activities related to the cultivation of medical marijuana including but not limited to; direct supervision and training of any cultivation staff, oversight of the grow plan, the application or removal of any nutrients, additives or pesticides allowed in the Pennsylvania State regulations and the harvesting and transfer of any medical marijuana from the cultivation area to the storage or processing area.
Inventory and Production Manager

The Inventory and Production manager is responsible for all bottling, labeling, and packaging of medical marijuana products upon the completion of processing. They are responsible for diversion prevention and recordkeeping to appropriately account for all medical marijuana products including any spillage or damage during the bottling or packing process. The Inventory and Production manager is responsible for storage of all finished medical marijuana products and is the primary employee responsible for fulfilling manifests and transferring all deliveries to the delivery drivers.

Executive Vice President of Sales

The Executive Vice President of Sales has the primary responsibility of delivering the right revenues; be that defined as a hard number, growth target, profit target and/or a market share goal. Secondary responsibilities include recruiting, building the sales strategy, and devising the sales tactics. Accomplishes national sales objectives by recruiting, selecting, orienting, training, assigning, scheduling, coaching, counseling, and disciplining employees in assigned districts; communicating job expectations; planning, monitoring, appraising, and reviewing job contributions; planning and reviewing compensation actions; enforcing policies and procedures.

Customer Service Manager

Achieves customer service objectives by contributing customer service information and recommendations to strategic plans and reviews; preparing and completing action plans; implementing production, productivity, quality, and customer-service standards; resolving problems; completing audits; identifying customer service trends; determining system improvements; implementing change. The goal is to keep the department running in an efficient, compliant, and profitable manner, to increase customer satisfaction, loyalty and retention and to meet their expectations.

IT Manager

Maintains information technology strategies by managing staff; researching and implementing technological strategic solutions. This is a management-level position responsible for analyzing and directing all IT related activities of the organization with supervisory responsibilities for all staff assigned to the IT department. This position is accountable for ensuring continuity of computer services for computer users throughout the organization through planning, technical leadership, and project coordination. Accomplishes information technology staff results by communicating job expectations; planning, monitoring, and appraising job results; coaching, counseling, and disciplining employees; initiating, coordinating, and enforcing systems, policies, and procedures. Maintains staff by recruiting, selecting, orienting, and training employees; maintaining a safe and secure work environment; developing personal growth opportunities.
Maintains organization's effectiveness and efficiency by defining, delivering, and supporting strategic plans for implementing information technologies. Directs technological research by studying organization goals, strategies, practices, and user projects. Completes projects by coordinating resources and time tables with user departments and data center. Verifies application results by conducting system audits of technologies implemented. Preserves assets by implementing disaster recovery and back-up procedures and information security and control structures. Recommends information technology strategies, policies, and procedures by evaluating organization outcomes; identifying problems; evaluating trends; anticipating requirements. Accomplishes financial objectives by forecasting requirements; preparing an annual budget; scheduling expenditures; analyzing variances; initiating corrective action. Maintains quality service by establishing and enforcing organization standards. Maintains professional and technical knowledge by attending educational workshops; reviewing professional publications; establishing personal networks; benchmarking state-of-the-art practices; participating in professional societies. Contributes to team effort by accomplishing related results as needed.

**Director of Dispensaries**

Ensures implementation of all protocols, policies and procedures at each facility opened store making sure that the operations practice of all the stores comply the Company standards. Work together with the Director of Retail Operations and each store’s GM until the operation run smoothly, cleanly, complying with demands of marketing and sales. Provides liaison with the pharmaceutical and medical communities relative to prescription of medications; Assists the GM during the first weeks in the management of the stores which includes staff training and supervision of initial inventories, systems, equipment and budgets Performs other duties as assigned. Full cooperation with the all Company Director Make sure all stores/ dispensaries maintain the same level of service established by Directors throughout the years. Overseeing and managing activities of store for the time assigned; Responsible for ensuring implementation of the planned operations; Implementation of any specialty programs including monitoring daily routine of the store in agreement with the new customers and community; Conduct daily meeting for the first weeks after the store’s opening to create a routine in procedures; and after Assisting store manager in last minute projects as a result of the opening; Responsible with the store manager for the effectiveness of systems included but not limited to reports to Headquarter in the daily basis. Acting in place of the store manager in his or her absence and performing the duties and responsibilities when store managers are not available. Work in multiple stores, across large region, driving many miles to make sure stores run under same guidelines; Developing and maintaining records of authorized TAR for submission for reimbursement. Communicate effectively in writing and verbally; Making recommendations on program changes relative to covered services; Responsible for keep updated to new rules and regulation depending of the regions.
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Pharmacist

The pharmacist serves patients by preparing and dispensing medications; giving pharmacological information to multidisciplinary health care team; monitoring patient drug therapies. Complies with state and federal drug laws as regulated by the state board of pharmacy, the drug enforcement administration, and the food and drug administration by monitoring nursing unit inspections; maintaining records for controlled substances; removing outdated and damaged drugs from the pharmacy inventory; supervising the work results of support personnel; maintaining current registration; studying existing and new legislation; anticipating legislation; advising management on needed actions. Dispenses medications by compounding, packaging, and labeling pharmaceuticals. Controls medications by monitoring drug therapies; advising interventions. Completes pharmacy operational requirements by organizing and directing technicians' workflow; verifying their preparation and labeling of pharmaceuticals; verifying order entries, charges, and inspections. Provides pharmacological information by answering questions and requests of health care professionals; counseling patients on drug therapies.
Develops hospital staff’s pharmacological knowledge by participating in clinical programs; training pharmacy staff, students, interns, externs, residents, and health care professionals. Complies with state and federal drug laws as regulated by the state board of pharmacy, the drug enforcement administration, and the food and drug administration by monitoring nursing unit inspections; maintaining records for controlled substances; removing outdated and damaged drugs from the pharmacy inventory; supervising the work results of support personnel; maintaining current registration; studying existing and new legislation; anticipating legislation; advising management on needed actions. Protects patients and technicians by adhering to infection-control protocols. Maintains safe and clean working environment by complying with procedures, rules, and regulations. Maintains pharmacological knowledge by attending educational workshops; reviewing professional publications; establishing personal networks; participating in professional societies. Contributes to team effort by accomplishing related results as needed.

**Director of HR and Diversity**

Promotes and implements human resource values by planning and managing human resources programs; directing staff. The human resource director is directly responsible for the overall administration, coordination and evaluation of the human resource function. This job operates in a professional office environment. This role routinely uses standard office equipment such as laptop computers and smartphones. Travel is primarily local during the business day, although some out-of-state and overnight travel may be expected. Travel is approximately 25% of the time. This is a full-time position. Days and hours of work are Monday through Friday, 8:30 a.m. to 5 p.m. This position regularly requires long hours and weekend work. Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice. Develops organization strategies by identifying and researching human resources issues; contributing information, analysis, and recommendations to organization strategic thinking and direction; establishing human resources objectives in line with organizational objectives. Implements human resources strategies by establishing department accountabilities, including talent acquisition, staffing, employment processing, compensation, health and welfare benefits, training and development, records management, safety and health, succession planning, employee relations and retention, AA/EEO compliance, and labor relations. Manages human resources operations by recruiting, selecting, orienting, training, coaching, counseling, and disciplining staff; planning, monitoring, appraising, and reviewing staff job contributions; maintaining compensation; determining production, productivity, quality, and customer-service strategies; designing systems; accumulating resources; resolving problems; implementing change. Develops human resources operations financial strategies by estimating, forecasting, and anticipating requirements, trends, and variances; aligning monetary resources; developing action plans; measuring and analyzing results; initiating corrective actions; minimizing the impact of variances. Accomplishes special project results by identifying and clarifying issues and priorities; communicating and
coordinating requirements; expediting fulfillment; evaluating milestone accomplishments; evaluating optional courses of action; changing assumptions and direction. Supports management by providing human resources advice, counsel, and decisions; analyzing information and applications. Guides management and employee actions by researching, developing, writing, and updating policies, procedures, methods, and guidelines; communicating and enforcing organization values. Complies with federal, state, and local legal requirements by studying existing and new legislation; anticipating legislation; enforcing adherence to requirements; advising management on needed actions. Updates job knowledge by participating in conferences and educational opportunities; reading professional publications; maintaining personal networks; participating in professional organizations. Enhances department and organization reputation by accepting ownership for accomplishing new and different requests; exploring opportunities to add value to job accomplishments. Manages external relations with community action agencies and implements diversity engagement plan.

**Senior Provider Engagement Manager**

Managing staff and serves customers by marketing Knox Medical medicinal cannabis strains to State licensed ordering physicians. Resolves customer complaints by investigating problems; developing solutions; preparing reports; making recommendations to management. Accomplishes statewide sales objectives by recruiting, selecting, orienting, training, assigning, scheduling, coaching, counseling, and disciplining employees in assigned districts; communicating job expectations; planning, monitoring, appraising, and reviewing job contributions; planning and reviewing compensation actions; enforcing policies and procedures.

**Provider Engagement Representative**

Serves customers by marketing Knox Medical medicinal cannabis strains to State licensed ordering physicians. Resolves customer complaints by investigating problems; developing solutions; preparing reports; making recommendations to management. Adjusts content of sales presentations by studying the type of sales outlet or trade factor.

**Processing and Extraction Manager**

The Processing and Extraction Manager is primarily responsible for all day-to-day aspects of the extraction of THC and CBD from raw medical marijuana material. The responsibility of the manager include supervising processing staff, the daily maintenance and quality logs for the effective operation and daily cleaning of the processing and extraction equipment. The safety security integrity and cleanliness of the processing and extraction rooms and the proper disposal of any medical marijuana waste.
Financial Backer

An investor, mortgagee, bondholder, note holder, or other source of equity, capital or other assets other than a financial institution. Financial Backers are not involved in the day-to-day operations of Knox Medical.

Customer Service Representative

The overall purpose of the Customer Service Representative is to be responsible for delivering efficient, high quality customer service to patients, patients’ representatives, providers and state agencies. Answer calls in a professional, pleasant and courteous manner within 30 seconds. Receives and responds to all phone calls/inquiries, questions and concerns in all areas. Other duties may be assigned. Demonstrates helpful and effective telephone etiquette and customer service skills by providing appropriate information to callers. Establishes policies by entering client data and/or confirming pricing if applicable. Maintains and improves quality results by adhering to standards and guidelines; recommending improved procedures. Accomplishes tasks and organization mission by completing related results as needed. Updates job knowledge by learning new products descriptions. Responsible to be updated with new rules and regulations. Coordinate with other departments as appropriate. May assist with the training of newly hired personnel. Maintain clean and well –organized the department. Performs other duties as assigned.
SECTION 9 – B. EMPLOYEE QUALIFICATIONS

JOSE JAVIER HIDALGO – CHIEF EXECUTIVE OFFICER

Jose Javier Hidalgo is the Chief Executive Officer of Knox Medical. A business and finance expert in the medical cannabis industry with an extensive background in real estate development and investment, Mr. Hidalgo is utilizing his unique blend of management knowledge, national branding knowhow, and full vertical operations experiences to achieve newfound success in this growing and complex field. Mr. Hidalgo first applied these skills to the medical cannabis industry in 2014 by investing in a Colorado based operation. He later was instrumental in establishing a financing deal for one of the few licensed cultivators in Canada. These successful businesses resulted in an increased involvement with medical cannabis ventures in various U.S. markets. Mr. Hidalgo is now an industry expert, highly sought after for his depth of understanding in the multifaceted aspects of this evolving industry. Mr. Hidalgo has built an accomplished team comprised of legal, government affairs, investor relations, public affairs, real estate, and horticultural experts. He has established key relationships with existing cannabis market leaders in cultivation, processing and dispensing, along with analysts already successful in other jurisdictions. With the establishment of Cansortium Holdings LLC and the implementation of a national branding strategy, Mr. Hidalgo successfully led the licensing and financing effort for Knox Nursery of Winter Garden, Florida which was awarded one of the initial five, limited, and merit-based medical cannabis licenses in that state. His team delivered the strongest overall score during the process and he has guided the development through the strict and ongoing multifaceted approval steps required by Florida authorities. The overall vision of Cansortium Holdings LLC and Mr. Hidalgo is to establish a true national approach to the legal cannabis marketplace in multiple jurisdictions, this will enable the operations he leads to be nimble and profitable in this fast changing marketplace.

HENRY BATIEVSKY – CHIEF OPERATIONS OFFICER

Henry Batievsky is the Chief Operations Officer and Chief Financial Officer of Knox Medical. He co-founded Cansortium Holdings, LLC after a successful career in law and real estate development. Together with business partner José Javier Hildago, they successfully led the licensing and financing effort in Florida for Knox Nursery, which was awarded one of the initial five, limited, and merit-based medical cannabis licenses in that state. Henry received a BS in Economics from the University of Pennsylvania Wharton School of Business, and a JD from the University of California at Los Angeles. He began his career as a tax attorney at Paul, Weiss, Wharton, Rifkind & Garrison LLC, where he focused on major corporate mergers and acquisitions. He then applied his background in tax law to real estate development, founding a firm that brought over one million square feet of single and multi-family housing and commercial properties to market. His multi-disciplinary strengths are well-suited to managing a production, processing, and dispensing operation with multiple physical footprints in an industry undergoing rapid regulatory development. He regularly competes for Ironman competitions in his home of Miami, Florida, and around the country.
BRUCE KNOX – CHIEF CULTIVATION OFFICER
Bruce Knox is the Chief Cultivation Officer of Knox Medical. He is also the President of Knox Nursery, Inc., a second-generation family owned nursery based in Central Florida. Bruce was awarded one of five highly competitive licenses from the Department of Health to cultivate, grow, and dispense medical cannabis in Florida.

Knox Nursery is a classic American success story. Established on the family porch by Bruce’s parents in 1962, the company was built on the bedrock values of hard work and integrity.

A successful small business owner employing many Floridians, Bruce has steadily expanded over the years. Today, the nursery is one of the largest in the United States maintaining over 700,000 square feet of high tech greenhouse space producing 30,000 separate line items. There are no tractors or trailers on the property as the facility is administered in an environmentally conscious manner.

Bruce has always put the consumer first, and is constantly working toward improving and streamlining operations to ensure maximum customer satisfaction.

DR. NORMAN FREY – MEDICAL DIRECTOR
Dr. Norman Frey is the Medical Director at Knox Medical. With nearly four decades of medical experience, Dr. Frey lends his considerable expertise and unique philosophy in patient care to our efforts to serve Pennsylvanians most in need of modern cannabis therapeutics. After finishing his undergraduate studies at Washington & Jefferson College, Dr. Frey completed graduate level work in Medicinal Chemistry in-state at the University of Pittsburgh. He then attended the Chicago College of Osteopathic Medicine and received a Doctorate in Osteopathic Medicine. There he won recognition for his research with departmental awards in Dermatology and Nephrology and was inducted into the Sigma Sigma Phi Honor Society. Upon completion of his internship at Phoenix General Hospital, Dr. Frey returned to Pennsylvania as a practicing physician, caring for patients in Hospice and Assisted Living Facilities in the Pittsburgh area. In 1991, he became the Program Director for Family Practice Residency at St. Francis Central Hospital. Shortly thereafter, he accepted a position as Department Chair for Family Practice at UPMC South Side Hospital. A certified Medical Director, Dr. Frey returned to his roots in caring for seniors and the terminal ill in 1998 by starting a long tenure as Medical Director For HCR Manor Care Whitehall, a skilled nursing facility in Western Pennsylvania. Board certified by the American Board of Osteopathic Family Physicians, Dr. Frey maintains offices in Pittsburgh where he has lived for many years.

KERI BOZICH – SECURITY DIRECTOR
Keri Bozich is the Security Director for Knox Medical. Her career in criminal and private investigations spans over 15 years in both the private and public sector. After graduating summa cum laude from Washington and Jefferson College in 2003 with a BA in Accounting, Keri began her nearly decade long tenure as a Special Agent with the Criminal Investigation Division of the Internal Revenue Service. There she planned and conducted financial investigations, analyzed bank and other financial records, and conducted undercover surveillance activities. Keri’s work
with the IRS was awarded with the Law Enforcement Agency Directors Group Aware in 2008 as well as several Performance and Manager’s Awards. She left government service in 2013 to work as a Licensed Private Investigator, first for CSI Corporate Security and Investigations before founding her own firm. Keri is an expert sharpshooter and is proficient in the use of firearms and defensive tactics.

**DAVE EASTBURN – OPERATIONS DIRECTOR**

David is the Operations Director for Knox Medical and the founder and owner of Gro ‘n Sell. Established in 1978 as an innovative company providing top quality, young plant plug and liner trays, Gro ‘n Sell grew from David’s initial vision to become one of the most active providers of these products and solutions for plant breeders who seek to get their products to market in the United States. In the years since he founded the company, David has built broker-supplier relationships with over thirty companies and has become a go-to national authority on how to build successful greenhouse businesses. Even after 39 years at the helm, David is intimately involved in developing new crop programs to ensure his company’s relevancy in the ever-changing horticultural market. This also has meant making big investments in new technologies like PICAS inventory management, Argus Greenhouse Control Systems, Blackmore seeders, Urbinati flat fillers, and GTI Boom Systems.

Gro ‘n Sell grew out of David’s earlier successful ventures in Eastburn Greenhouses, also based in Chalfont. His efforts there revolutionized the bedding plant program for growers in the Northeast region and for the Burpee/Ralston Purina Company. The bedding plant program was the first to brand specialized color-coded packaging and deliver to independent garden centers. This practice became the industry standard no more than 15 years later.

David’s commitment to his business and his local community stems from his religious education and continued work with his faith. After receiving a BS in Biblical Studies from Langhorne’s Cairn University, he continued his education in Hebrew, Archeology, and Islamic studies at the University of Jerusalem. He attended Seminary shortly before founding Gro ‘n Sell. Inspired by deep connection to his faith, David organizes mission trips through Gro ‘n Tell Puppet Ministry, which spreads goodwill and understanding to countries around the globe through the art of puppetry.

**FERNANDO GRANJA – GENERAL MANAGER**

Fernando Granja is the General Manager of Knox Medical. His responsibilities as General Manager are wide ranging and include the day-to-day operations management of the company’s three-acre greenhouse facility. He is responsible for ensuring the state-of-the-art facility is properly maintained, including the sensitive irrigation, heating, and ventilation systems. Fernando also oversees the administrative functions for the company, from payroll and hiring decision to IT management and crop inventorying. With over 30 years at the company, Fernando has built and maintained extensive relationships with greenhouse professionals in the region and across the country.
Fernando’s story is representative of the uniquely American narrative of rising to the top in one’s field through hard work and dedication. He started as crew member on David Eastburn’s landscape contracting team, progressing to crew leader through accumulation of plant knowledge and experience. After a short period of time in Florida in the textile industry, Fernando returned home to Chalfont, PA to join Gro ‘n Sell in 1985. He is a proud product of the Pennsylvania education system, having attended Montgomery County Community College in Blue Bell before obtaining a Bachelor’s in Business Administration from Philadelphia’s Temple University.

ALEX KAROL – PROCESSING AND EXTRACTION DIRECTOR
Alexander Karol is the Processing and Extraction Director for Knox Medical. Since Alexander Karol can remember, he wanted to be a doctor. Knowing how competitive this path was, he knew that stellar grades and extra-curricular activities would become a priority in his academic life. Aside from maintaining a 3.96 GPA at the University of Florida, he was elected Vice-President of the largest AMSA (American Medical Student Association) chapter in the country during his second semester. His involvement with AMSA carried over to Tufts University, where he breathed new life into the program by co-founding the Sharewood Project, which provides free health care services to underprivileged people; as well as organizing field trips to notable medical conferences throughout the northeast. However, it was only after applying to medical schools that he realized his true passion was research.

After graduating from Tufts University in 2007 with a B. S. degrees in Biomedical Engineering and Biopsychology, Alex relocated back to Orlando, Florida, where he was fortunate to join a team of prominent scientists in the VaxDesign Corporation performing novel research in immunology. Utilizing the proprietary MIMIC® (Modular Immune Invitro Construct) system as the foundation for his research, Alex had the means of validating and honing his interest in alternative medicine, which lead to a patent and numerous publications. After the company was acquired by the largest pharmaceutical company in the world, Sanofi, Alex quickly progressed in the area of automation, assay development, and inventory management.

His thirst for remaining on the edge of alternative medicine has led Alex into a direct shot with cannabinoids. It wasn’t long before Alex discovered how powerful the chemicals found in the marijuana plant are in treating numerous illnesses. Some of which, are very personal to him. Alex hopes to bring his scientific expertise and charisma to promote and advance the research of cannabinoids in treating those, including his own mother who is struggling with early-onset Alzheimer’s, about this safer, more efficient, and cheaper way of treating their disease.

ASTON ARCIDIACONO – CULTIVATION MANAGER
Aston Arcidiacono is the Cultivation Manager for Knox Medical. In this capacity, he oversees all areas of production in the three-acre greenhouse, including supervising the growers, department managers, and contractors who work in the state-of-art facility. In his 5 years at Gro ‘n Sell, Aston has been deeply involved in every aspect of the product cycle, from growing and cultural work to implementing an IPM program that emphasizes biological control agents as a first line of defense for both pest and disease problems. His work earned him a spot on greenhouse Product News “40 under 40” program, receiving industry recognition for “setting the pace for the future of the horticulture industry.”
Prior to joining Gro ‘n Sell, Aston worked for several Pennsylvania agricultural producers, including Barefoot Gardens in Doylestown, the Penn State Cooperative Extension in Nazareth, and at Branch Creek and Blooming Glen Farms in Perkasie, all of which provided him with hands-on experience growing, marketing, and educating farmers on organic farming practices. Aston’s deep ties to the state include receiving a BS in Ornamental Horticulture from Delaware Valley University in Doylestown, PA.

JONATHAN EASTBURN – INVENTORY AND PRODUCTION MANAGER
Jonathan Eastburn is the Inventory and Production Manager for Knox Medical. In this role, he oversees production in the sticking, sowing, and vegetative departments and manages seasonal and contract labor to ensure all staff are following protocols and working efficiently. Through his experience at Gro ‘n Sell, Jonathan has become proficient in PICAS, Argus Green Control Systems, and the other advanced IT modeling software the company employs to manufacture the top quality agricultural products for which they are known. He was a Quality Control Manager for the company prior to his promotion, ensuring that all marketable material was of the highest quality before it was shipped to customers around the region.

Jonathan’s other great passion is in music education, a field in which he received a BA from Mechanicsburg’s Messiah College in 2012. Right after college, he left the country to teach music to students of all grade levels at the Santiago Christian School in the Dominican Republic. His time there provided him an immersive language-learning environment to improve his mastery of Spanish. Jonathan currently lives in Pipersville, PA.

LUIS DECASAS – DISPENSARY MANAGER
Luis DeCasas is the Dispensary Manager and Director of Retail Operations for Knox Medical. He is a hospitality professional with more than 17 years of experience in hotel, restaurant, bars and club management including finance, food & beverage, operations, events sale, project management and branding development. Starting as a busboy and server at the London outpost of famed restaurant Nobu, Luis rose through the ranks to become Director of World Operations for Nobu Restaurants, which now operates in 16 international cities on 5 continents. From Nobu, he launched a career opening and managing high-end restaurants and hotels from Mexico City to Sydney, Las Vegas to Miami. In 2010, Luis became the Vice President of Hospitality for the Brilla Group and the historic Raleigh Hotel on Miami Beach. In that role, he oversaw the hotel’s remodeling, developed the departmental restructuring for the property’s eventual sale, and managed the hospitality and culinary programs for the group’s nine other properties around the Caribbean. His success there led him to become the COO of the Faena Group, a real estate and hospitality development firm that was attracting $1 billion in new investment in the historic Art Deco district around Miami’s Saxony and Versailles Hotels. Prior to joining Knox Medical in 2016, Luis most recent project was developing the first Xtreme Sports Hotel at the recently completed Formula 1 racing circuit in Austin Texas. Luis holds a BA from the Art University of Huelva, Spain and a JD from the University of La Rabida/University of Sevilla.
PAULA HARRILAL – EVP SALES AND PATIENT AND PHYSICIAN OUTREACH
Paula Harrilal is the Executive Vice President of Sales and Patient and Physician Outreach for Knox Medical. In 1997, Paula began a long career in healthcare, insurance, and provider outreach. First at Blue Cross Blue Shield of Florida and then at Tenet Healthsystem, Paula developed long-standing relationships with physicians, surgeons, and other providers in Southern and Central Florida. She implemented $100 million + in cost savings, reduced administrative costs to 8%, and increased compliance standards. Paula accepted a position as Vice President of Provider Relations for Amerigroup Community Care in 2006, where she oversaw a team of 26 associates and was able to grow membership 24% while delivering $21 million in medical cost management savings. In 2008, Paula became the Founder and CEO of MCO Realtime Solutions, a healthcare consulting firm that specializes in supporting and guiding managed care organizations with business development, health plan licensure filings, provider training materials, and more. After nearly a decade growing her team of 38 independent contractors, Paula joined Knox Medical to become a critical part of our team delivering modern cannabis medications to those most in need of treatment and relief. Paula holds both a BA in Business Administration and an MBA from Nova Southeastern University.

DEONE CANADY – CUSTOMER SERVICE MANAGER
Deone Canady is the Customer Service Manager for Knox Medical. In this role, she supervises a team of associates responsible for facilitating customer orders and maintain customer satisfaction by providing problem-solving resources. Deone is an accomplished healthcare professional with experience in managed healthcare, provider relations, project management, member services, and patient-focused customer service. Prior to joining Knox Medical, she worked on customer-facing operations and call centers for IVG and RJD stores. In 2011, Deone became a Provider Relations Contract Manager for MCO Realtime Solutions, where she supervised a team of 22 independent contractors across 4 health plans. Her track record of working to find positive solutions for providers and patients also included time at the Jessie Trice Community Health Center in Miami, FL and Positive Healthcare. Deone received an Associate of Science Degree in Healthcare Management from Allied Health Institute in 2013.

ZACK KOBRIN – GENERAL COUNSEL AND CHIEF COMPLIANCE OFFICER
Zack is the General Counsel and Chief Compliance Officer for Knox Medical. He is an accomplished attorney with a long track record working on behalf of clients in the medical marijuana industry. After graduating from the Florida State University with a Bachelor of Science in Economics and Political Science, Zack went to work for Florida State Senator Gwen Margolis as a Senior Legislative Aide. In that capacity, he was the senator’s chief policy advisor and drafted legislation involving real estate, taxation, transportation, economic development, and environmental preservation. In 2012, after graduating from the Florida State University College of Law, Zack joined the Miami firm of Lydecker Diaz as an Associate Attorney, rising to the level of Co-Chair of their Medical Marijuana Practice Group. His practice areas include: commercial litigation and corporate transactions/M&A, condominium and homeowners’ association, real estate, land use, governmental liability, insurance coverage, trademark disputes and extra contractual liability. In his new role as General Counsel, Zack is responsible for all corporate and regulatory legal matters, including ensuring compliances with Federal, state, and local government regulations. He is admitted to the bar in the State of Florida and in the United States District Courts for the Southern, Middle, and Northern Districts of Florida.
CASEY WOO – IT DIRECTOR
Casey Woo is the IT Director for Knox Medical. Casey is an IT professional with a long track record assisting companies in improving their customer-facing operations. After graduating from the University of Florida, Casey accepted a position as a System Administrator and Property Expert for the Miami-based Vassili Group. There he managed IT operations for multiple restaurant locations and implemented POS/back office improvements, cloud-based reporting inventory management, and cost analysis on vendor relationships. Soon after, Casey joined the Baltus Collection as a Business Analyst, where he developed specialized workbook calculators, conducted demographic research, and implemented best practices for the firm’s search engine optimization metrics, social media engagement, paid media, and more. Casey has also worked for several start-ups, including Picglaze USA and Toast, Inc., where he grew the startup from 20+ employees to over 450 nationwide and was responsible for building training standards for new engineers. In 2012, he founded Skyview Management, Inc., which provides Small- and Medium-sized enterprises consulting services in IT network architecture/construction, database management, system implementation, efficiency analysis and optimization, financial reporting, and business performance analysis.

PHARMACIST – DENISE E. MAHER
Denise E. Maher is a pharmacist for Knox Medical. She is a licensed pharmacist in the state of Pennsylvania with 20+ years of experience providing top-notch pharmacy services in a retail setting. Since 1993, she has been dedicated to providing quality patient care and fast and accurate medication dispensing as a staff pharmacist in Butler, PA. She received her Bachelors of Science in Pharmacy from Pittsburgh’s Duquesne University.

CULTIVATION CONSULTANT - ASHLEY PEBBLES
Ashley Pebbles is a cultivation consultant for Knox Medical. She is a well regarded national activist and patient’s rights advocate who was heavily active in the 2014 and 2016 medical marijuana ballot initiatives in Florida. Since 2012, she has been the Owner and Head Grower for Doctor’s Orders, a medical marijuana growing/processing/dispensing firm with locations in Colorado and Oregon. Doctor’s Orders grows over 40 strains of medical-grade cannabis, with yearly sales approaching $4 million per annum. From 2009 to 2011 she also was the Owner, President, and Head Grower of Green Pharm Co-Op, a boutique cooperative in San Diego, CA offering high-quality medications to over 300 patients. Through her Panda Consulting, LLC, Ashley provides consulting services specializing on retail and cultivation operations, development of standards of procedure, employee training and cultivation setup and design. She holds an Associates Degree from Florida State College in Jacksonville, FL.

CULTIVATION CONSULTANT – DR. JIM FAUST:
Dr. Faust has consulted for Gro ‘n Sell for over seven years. He advises us on specific plant culture that differs from genera to genera, and keeps the company up to date on “new” growing techniques that help us improve efficiencies. As an expert in Floriculture Physiology, Dr. Faust focused on quantifying the effects of environmental and cultural factors on the production of greenhouse crops. In particular, he is well known for his research on the Poinsettia, with two books on the flower including the soon-to-be-published “Poinsettia: A Journey from Gangly Mexican Shrub to Iconic Holiday Flower.” After receiving a B.S in Agriculture from Murray State University, Dr. Murry went on to earn a Ph.D at Michigan State University. Soon after, Dr. Faust accepted a
professorship at the University of Tennessee’s Department of Ornamental Horticulture & Landscape Design. In 1999, he started a lengthy tenure with the faculty of the Clemson University Department of Horticulture, rising to the position of Dept Chair. He continues his research as an independent consultant for us and other leader greenhouse growers in the industry.

CULTIVATION CONSULTANT – DR. BILL ARGO
Dr. Argo has been working with Gro ‘n Sell for over twenty-five years. He works for the Blackmore Company which provides us with soil, large greenhouse equipment, and fertilizer. He regularly visits Gro ‘n Sell to discuss the fertilizer regimen and to determine whether adjustments need to be made. In Dr. Argo’s nearly 40 years of professional experience, he has accrued industry recognition as a leading authority on designing and implementing fertility programs. He is the recipient of several Alex Laurie Awards from the Ohio Florist’s Association and the prestigious Kenneth Post Award from the American Society for Horticultural Science for his research in the field. Dr. Argo received his BA in Chemistry from Indiana University and his Ph.D in Horticulture from Michigan State University, where his dissertation research focused on influencing calcium and magnesium uptake in the root zone of container crops.

INTEGRATED PEST MANAGEMENT CONSULTANT – KOPPERT BIOLOGICAL SYSTEMS:
Koppert works alongside our Head Grower to develop and implement the Integrated Pest Management (IPM) Program. Koppert Biological Systems which supplies Gro ‘n Sell with beneficial insects which are used to safely/effectively cut down on many greenhouse pests. Koppert provides an integrated system of specialist knowledge and natural, safe solutions that improves crop health, resilience and production.

GENETICS CONSULTANT – DR. CARLOS BUSTAMENTE
Dr. Carlos Bustamente is Professor of Biomedical Data Science, Genetics, and Biology at Stanford University, the Inaugural Chair of the Department of Biomedical Data Science, and a consultant to Knox Medical on issues relating to genetics and plant genomics. He is a population geneticist whose research focuses on analyzing genome wide patterns of variation within and between species to address fundamental questions in biology, anthropology, and medicine. In two decades of research and study, Dr. Bustamente has developed a reputation as one of the nation’s leading minds on the interface of computational biology, mathematical genetics, and genomics. He received a Marshall-Sherfield Fellowship in 2002 and John D. & Catherine T MacArthur Foundation Fellowship in 2008. At Stanford, he along with colleague Marc Feldman established the Stanford Center for Computational, Evolutionary, and Human Genomics. Prior to joining the faculty of Stanford, he was a professor with the Cornell University Department of Biological Statistics and Computational Biology and a Visiting Scholar at the NSF Institute for Pure and Applied Mathematics in Los Angeles, CA. Dr. Bustamante earned his BA, MS in Statistics, and PhD in Biology from Harvard University.

EXTRACTION AND MANUFACTURING CONSULTANT – DUANE
Dr. Duane Dundore is an extraction and manufacturing consultant for Knox Medical. Dr. Dundore is an accomplish Electrical and Thermal Dynamics Engineer, with a background in commercial
and industrial design and installations. He is currently the Owner and Chief Technology Officer of Khrysos Global, Inc. Under his direction, Khrysos designed, builds, and sells a fully automated supercritical CO2 extraction system for use in the cannabis industry. Prior to founding Khrysos, Dr. Dundore was Chief Technology Officer for Eco Ventures Group, Inc. for Raptor Technologies Group. In 2007, he was awarded with the State of Florida’s William C. Schwartz Industrial Innovation Award for converting elements in sewage overflow into B100 Biodiesel. Dr. Dundore received a Ph.D in Electrical Engineering.

HUMAN RESOURCES AND DIVERSITY CONSULTANT - SHEMARIOH WAGGONER

Shemariah Waggoner is Knox Medical’s Director of Diversity and Human Resources. She joins the operation with years of experience guiding diversity efforts for major the Pennsylvanian corporations, government agencies, and non-profits. She began her career with Northside Leadership Conference in Pittsburgh as Project Manager and later Program Manager for the agency’s Housing Development Program. There, she packaged, managed and secured financing for 18 residential development projects in 9 neighborhoods on the Northside from pre-construction to final sale. Soon after, Shemariah joined PNG Financial Services as an internal consulting providing guidance on improving the company’s business practices in serving low to moderate-income and minority families. Her work there led her to become an advisor and independent contractor for Pittsburgh’s Minority and Women Educational Labor Agency, where she oversaw daily operations, HR, fiscal management, and program development and was successful in securing over $1.2 million in funding from some of Western Pennsylvania’s largest philanthropic non-profits. In 2006, Shemariah accepted a position as Supplier Diversity Coordinator at UMPC, where her efforts earned the hospital recognition as the “Corporation of the Year” for their supplier diversity practices by the Western Pennsylvania Supplier Development Council. For the last nine years, she has consulted with some of the region’s largest private and public sector entities, including the Pittsburgh Board of Education and UPMC Insurance Services, to implement organizational and procurement reforms and to streamline operations. She has a successful track record of managing programs that promote organization objectives, generate process improvements, and ensure compliance of grant and government contracts. Shemariah holds a BA in Media Studies and Sociology from the Pennsylvania State University in State College.
SECTION 9 – C. EMPLOYEE TWO-HOUR TRAINING REQUIREMENT

The Chief Operating Officer and the Human Resources Director will be responsible for implementing the plan to ensure all employees will meet the two-hour training requirement under the Act and Regulation.

The HR Director will keep a master list of all employees who have successfully passed the background check and been offered an employment and accepted.

At the time the employee completes their documentation for enrollment in the company’s payroll and benefits system, the employee will select a date and time within 10 days for completing the required training.

Upon completion of the training, the employee is to provide confirmation to the HR Director of the completion of the course.

If the HR Director does not receive the written confirmation of the completion of the course within 5 business days of the initial scheduled date, the employee will be required to select a second date and time within 10 business days to complete the required training.

If the HR Director does not receive written confirmation of the completion of training within 5 days of the scheduled training, the employee will be required to select a third and final date and time to complete the required training.

If the HR Director does not receive written confirmation of the completed required training within 5 days of the scheduled training date, the HR Director shall refer the matter to the Chief Operating Officer for review and possible termination.

If the employee does not complete the required training by the 85th day of the eligibility period, the employee will be automatically terminated but may be reinstated upon completion of the required training, only if the employee can demonstrate good cause for the failure to meet the company’s training time-frame for the Commonwealth required training.
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