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# OVERVIEW

This DIY guide pertains specifically to sheets that are "plans" or "onboarding and training." This DIY guide does not pertain to sheets like job descriptions, cost lists, agreements, or logs (for these, simply follow each sheet's sheet specific DIY guide).

In this Customize Your leafsheet : Do it Yourself (DIY) guide you will learn how to take control of your vision for your cannabis company by editing your leafsheets documents ("sheets") to include your state's regulations and your company's special sauce. We like to say that your sheets are the seeds that get you 80% of the way full bloom, and the rest of the 20% comes from your customizations acting as the water and sunlight.

Having your state's marijuana regulations integrated into your sheets will make your license application or in-store SOPs (however you've decided to use the sheets) aligned specifically to what the state wants to see from its cannabis businesses owners. Adding your secret sauce makes your sheets aligned with just the way YOUR business works.

## WHAT'S YOUR STARTING POINT?

### LICENSED CANNABIS BUSINESS

If you are using your sheets for an already licensed cannabis business, then you can start off by using this guide along with each sheet's specific DIY Customization Guide.

### LICENSE APPLICANT

If you are using your sheets to put your hat in the ring for a cannabis business license application, then **do not start editing your sheets** until you have completed the Dissecting Request for Application process.

Doing the work to understand what the application requires from you will further inform how you need to edit your sheets to provide all the information requested.

# SOME IMPORTANT Q&A

First, let's go over some frequently asked questions to make sure we're all on the same page and you understand WHY this guide is so valuable and necessary.



## What are the benefits of taking the time to do these DIY custom edits?

1. Your license application will have a higher chance of success
2. Your standard operating procedures will be prepared for any state inspection.



## What kinds of edits are these?

1. Incorporating your state's cannabis regulations to ensure that your documents are compliant with your state, specifically.
2. Your special sauce (take this chance to read through your sheet(s) and make any changes necessary to make the sheets specific to the way you do/will do things at your business).
3. Following your sheet-specific DIY guide to insert the basic company specific information needed.



## Why do I need to put regulations in my sheets?

1. If you're applying for a cannabis business license, your state regulators WILL require that you follow all of the rules in the regulations that pertain to your type of cannabis business.
2. In order to show the state that you will be following all the rules, you want to write the rules in to your processes and procedures which are provided in your sheets.
3. You WILL (likely) NOT be granted a license if your processes and procedures don't follow the rules.
4. When you're operating your business, the state regulators will come by for an inspection from time to time and will likely ask to see your operating procedures (the sheets) and they'll want to see that your procedures include the state-specific rules.



## What if I don't have time to do this? Is there someone I can hire to help me?

1. Yep! There are people you can hire that cost much less than having to pay a law firm's hourly rate or a consultant. Though having a lawyer available to do a final review is advised as, although we guide you through some tried and true processes for integrating regulations into your sheets on your own, leafsheets is not a law firm and does not provide legal advice.

Here are 2 cost effective ways to get these customizations done without having to do them all yourself :

- A paralegal for ~\$20/hour. You may be able to find this person by posting a free job posting on a job site like indeed, or on a talent site like UpWork.
- An adequately intelligent individual who is good at following directions and can read, understand, and follow this step-by-step do it yourself guide, for ~\$15-\$20/hour.

 2. Some skills that make someone well suited for successfully following this guide include:

- Attention to detail
  - the ability to achieve thoroughness and accuracy when accomplishing a task
- Information organization
  - The ability to collect, record, retrieve, evaluate, select, understand, and process information in order to analyze, apply, rearrange and reuse that information.
- Reading comprehension
  - The ability to accurately interpret and understand written information
- Editing
  - The ability to prepare written material by correcting, condensing, or otherwise modifying it.
- Creative writing
  - Writing which displays imagination or invention
- Critical thinking
  - The ability to objectively analyze and evaluate an issue in order to form a judgment.
- Endurance
  - The power of enduring an unpleasant or difficult process or situation without giving way.
- Achievement orientation

- o This person gets satisfaction from achieving a goal and thus has the stamina to continue in a long process until the end goal is accomplished, without burning out.
- Arrangement
  - o When faced with a complex situation involving many factors, this person enjoys managing all of the variables, aligning and realigning them until they are sure they have arranged them in the most productive configuration possible.



### What regulations do I need to cite?



1. Your state's cannabis regulation.

- You can locate the regulations on your state's marijuana regulator website (search google for: "[State Name] marijuana regulation" or "[State Name] cannabis regulation").
- Once you find the state website, there should be a section for "rules" or "regulations".
- If there is a .pdf version of the regulation, download it. If the regulation is only available in an online format and not in .pdf, bookmark the website because you're going to be there a lot.
- Some states will have multiple regulations pertaining to marijuana regulation. The marijuana regulator's website should have access to all of these regulations. If there are multiple regulations make sure to download or bookmark all of them.



2. Jurisdiction or City regulations as they pertain to your business type.

- Some local jurisdictions will have specific rules for operating a cannabis business in that jurisdiction. To find these rules search google for "[City/Town/County Name] marijuana rules and regulations."
- Your local jurisdiction may have general regulations that relate to operating a business of any type in that jurisdiction, such as zoning, water use, and signage rules (there may be others, do your research about the specific jurisdiction where your business is/will be located).



3. Federal laws that pertain to your business. Some of these include:

- Occupational Safety and Health Administration
- Poison Prevention Packaging Act (PPPA)
- The Federal Food Drug and Cosmetic Law
- Fair Labor Standards Act (FLDA)
- Energy Policy Act
- Truth in Advertising
- Americans With Disabilities Act (ADA)

# WHAT YOU'RE IN FOR



## Time & energy

We'll be real with you (as always). Customizing your sheets will require a significant amount of time and focus. The good news is, you've already saved tens to hundreds of hours of your time and energy, depending on how many sheets you've purchased, and simply having the sheets has put you far ahead of the game.

Please make sure to allot yourself an abundant amount of time, five times longer than you think it might take you. You really want to make sure that every step is complete in your editing, especially your final quality final review. You want to have the time to do the customizations that you'll learn in this guide and to make sure that everything's on point and that you can put everything together correctly.



## Reading

We've done what we can to simplify this process enough so you don't have to read your entire state cannabis regulation (that can be an exhausting read!) and can instead piece out the parts that pertain to your business. However, we do suggest reading the entire regulation, as it will help you in operating your company and ensuring you are fully aware of the rules.

And....this guide requires a substantial amount of reading. We've separated it out into section so you can navigate it piece by piece. But...it is 28 pages of content (hey, at least there are pictures, some pages with a lot of blank space, and you're already 4 pages into the content!)



## Better results

As you follow this guide, we cannot promise that you will get a license (because we don't make the decision!), but we can promise that you will have a better chance at submitting a great application than you would have otherwise. We also can't promise that you'll pass every state inspection once you're operating (because we're not running your daily operations!) but we can promise that your operating procedures will be ship shape once you get all the regulations in there.

You chose to have leafsheets on your side which already shows you mean business! Now, take things to the next level with these customizations.

## Let's Get Started!

# FIRST THINGS FIRST

1. Select one of the sheets that you purchased.
2. Follow the process in this guide completely for that sheet and then do the same for every other sheet you have, individually.
3. Locate your sheet's specific DIY guide on leafsheets.com (you will use the sheet specific guide to complete some portions of this process).
4. Have each regulation that pertains to your business type easily accessible (cannabis regulation(s), general local business regulations, federal regulations) either in .pdf format or online. Your sheet specific DIY guide will have more instruction about how to find your regulations.



# THE STEP-BY-STEP PROCESS

Are you ready?! Here's a full-blown step-by-step of how to get your sheets from where they are to where you want them to be.

Some of these steps may seem like no brainers but we don't want you to miss a beat so we're including them anyway. For the sake of explaining how to do this customization process, we use the Security Plan as an example.

However, use this guide is for all of your sheets as this step-by-step method applies to every plan and onboarding and training that you've purchased!



# CREATING THE NOTES DOCUMENT

## Step 1 : Create a word document for note taking

Open a blank word document for note taking.

## Step 2: Title



First do this:

Write the title of the sheet at the top of the document. Make it a large font (ex: 48pt) and bold.



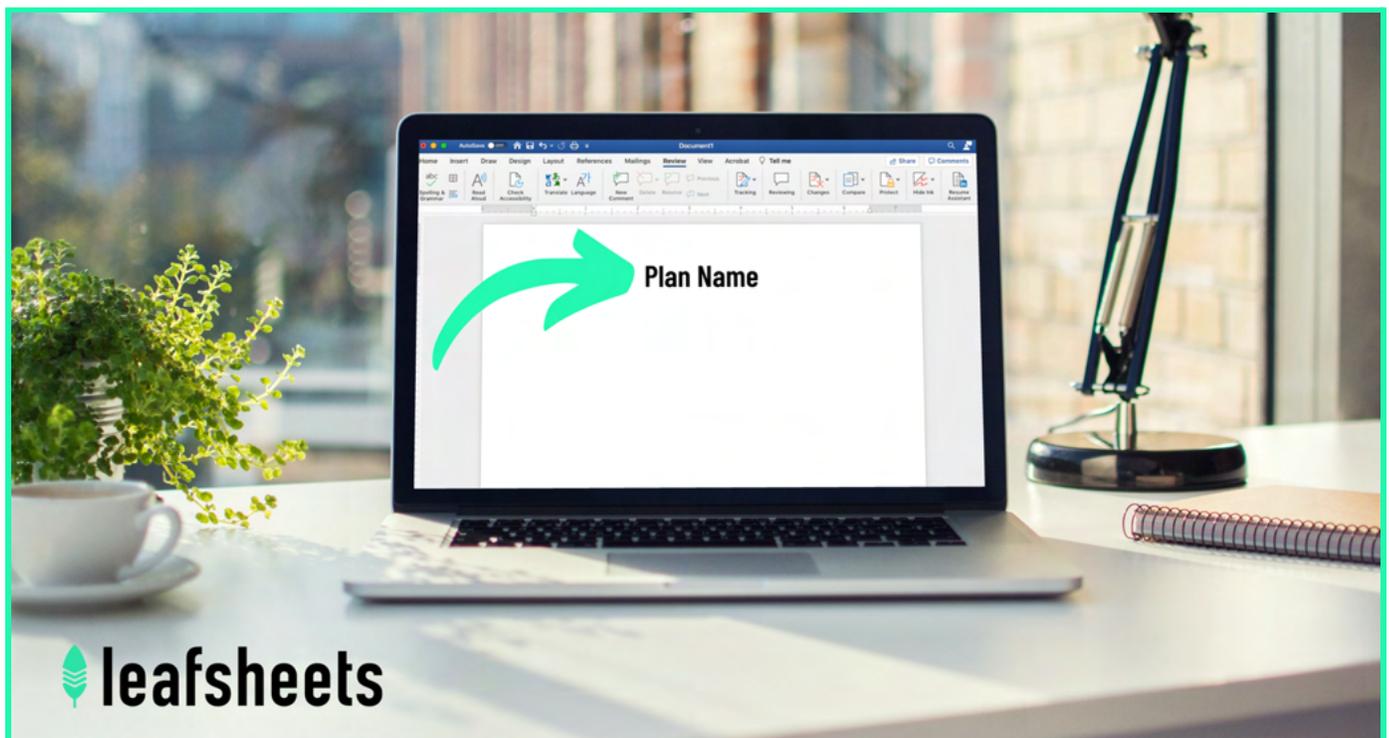
Then do this:

Save the document as "[Sheet Name] Notes"

Like this example of completed Step 2:



Your notes documents should now look like this:



### Step 3: List of related words

The title of your sheet lets you know what type of topics you'll want to look for within the regulation(s) in order to find the rules that pertain to the sheet.

For instance, if the title of the sheet is "Security Plan", then you will specifically want to focus on the security related rules within the regulation(s). Each sheet's specific DIY guide will have a list of terms to search for in the cannabis regulation.



1. Copy and paste the list of search words from your sheet specific DIY guide to your notes document. These words will act as section headers as you make this blank word document into an outline of regulations.
2. Space the list out so there are at least 4 lines between each line
3. Bold the list of words

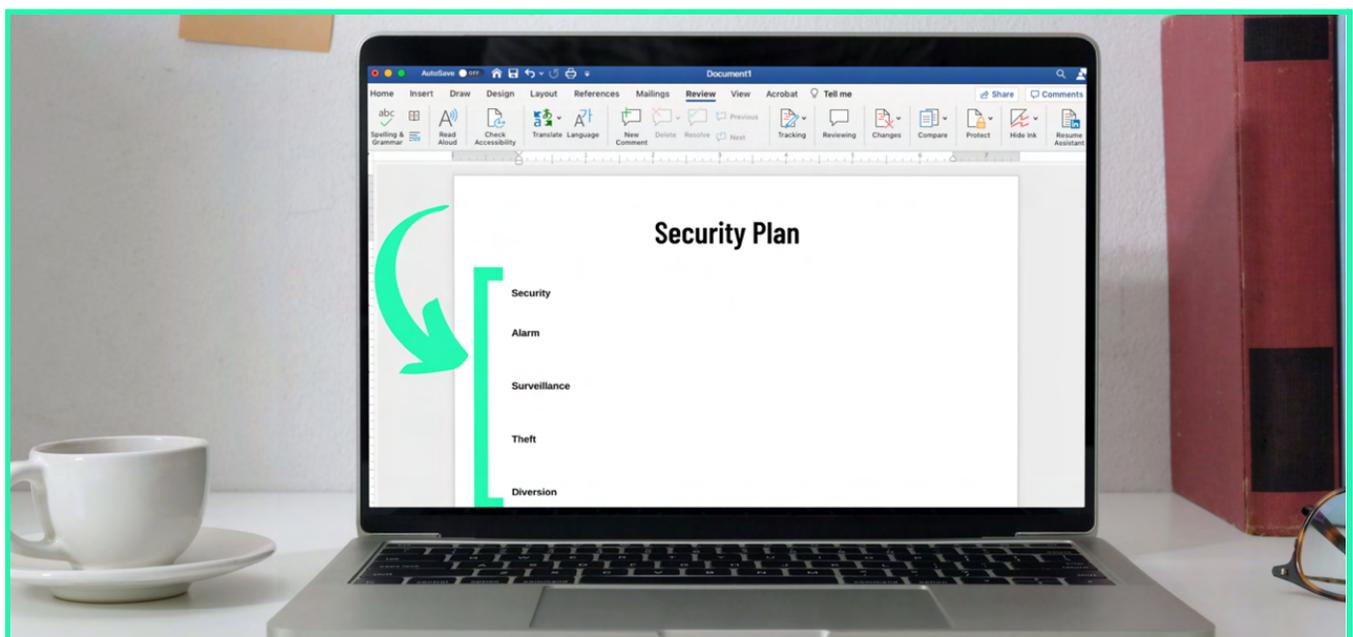


#### Like this example of completed Step 3:

If when editing your Security Plan, your notes document had a list of search words such as:

- Security
- Alarm
- Surveillance
- Theft
- Diversion

Your notes documents would then look like this (with the name of your sheet):



## Step 4: List regulations



Do this:

1. Under each search word on the list, place a list of each of the regulations that you will be reviewing.
2. Make sure that there are at least 3 blank lines between each regulation name.
3. Indent the list of regulations under each search word.



Like this example of completed Step 4:

Your notes documents should now look like this (with your sheet name, list of words and list of regulations specific to the sheet you are working on)



## Step 5: Page numbers



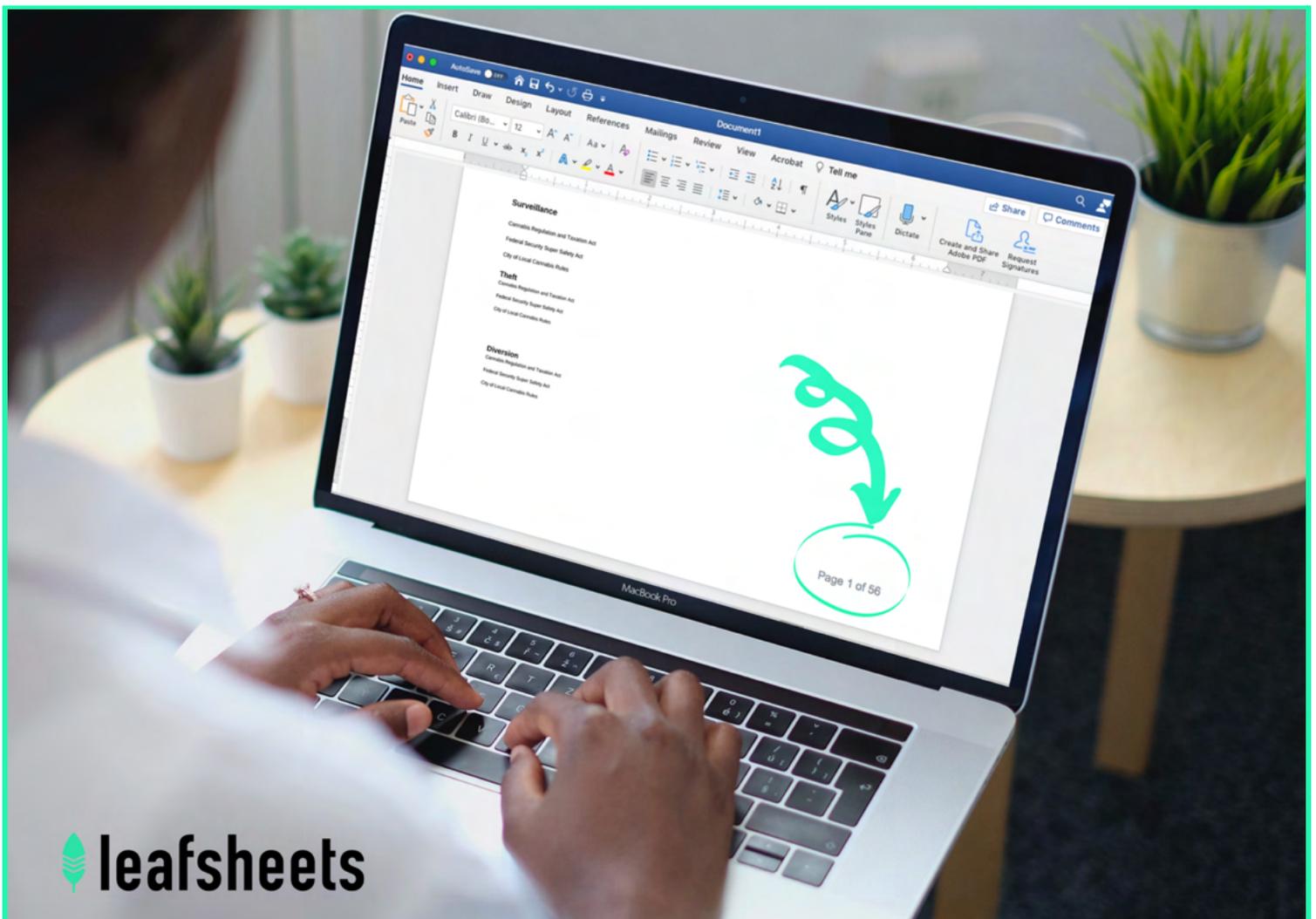
Do this:

Insert page numbers in the footer of the document. These notes will get lengthy, and the page numbers will help you with navigating the document.



Like this example of completed Step 5:

Your notes documents should now look like this (with your sheet name, list of words and list of regulations specific to the sheet you are working on)



# FIND KEY PIECES OF REGULATION

## Step 6: Search for key words

### Do this:

One by one, search for each search word on your list, within each of the regulations on your list.

- How to search: Whether you are searching your regs on a web page or in a pdf document, you can press the control button and the letter "f" on your computer keyboard at the same time and a search bar will come up. Use that to search for each word.
- When you want to move to the next place in the regulation where your search word appears, simply hit the return/enter button on your keyboard and that will immediately take you to the next mention of your search word.

### Simultaneously do this:

As you search each word, you will find sections of the regulation(s) which may or may not pertain to your sheet. If you believe that the sections of the regulation where you locate a word applies to the topic of your sheet, copy and paste the section to your word document, underneath the word you searched.

These 3 pieces of this part of the process are **VERY important**. 

1. Next to each section of regulation that you paste in your notes, write which page you found the regulation on.
2. Regulations are usually split up into sections and each section has a title. Write the name of the section where you found each piece of regulation that you paste in your notes.
3. Make sure you are pasting the copied text under the correct regulation name and under the correct search word on your notes page.



**Pro Tip:** If you are using a pdf version of the regulations, highlight the sections in the regulations which contain your search words, so the sections are easy to locate later on.



**Important Note:** Multiple search words may appear in the same piece of regulation. Place that text in the section of notes for every word that it contains since you won't yet know which topic the regulation is best suited for within your document, and it may be suited for many topics.



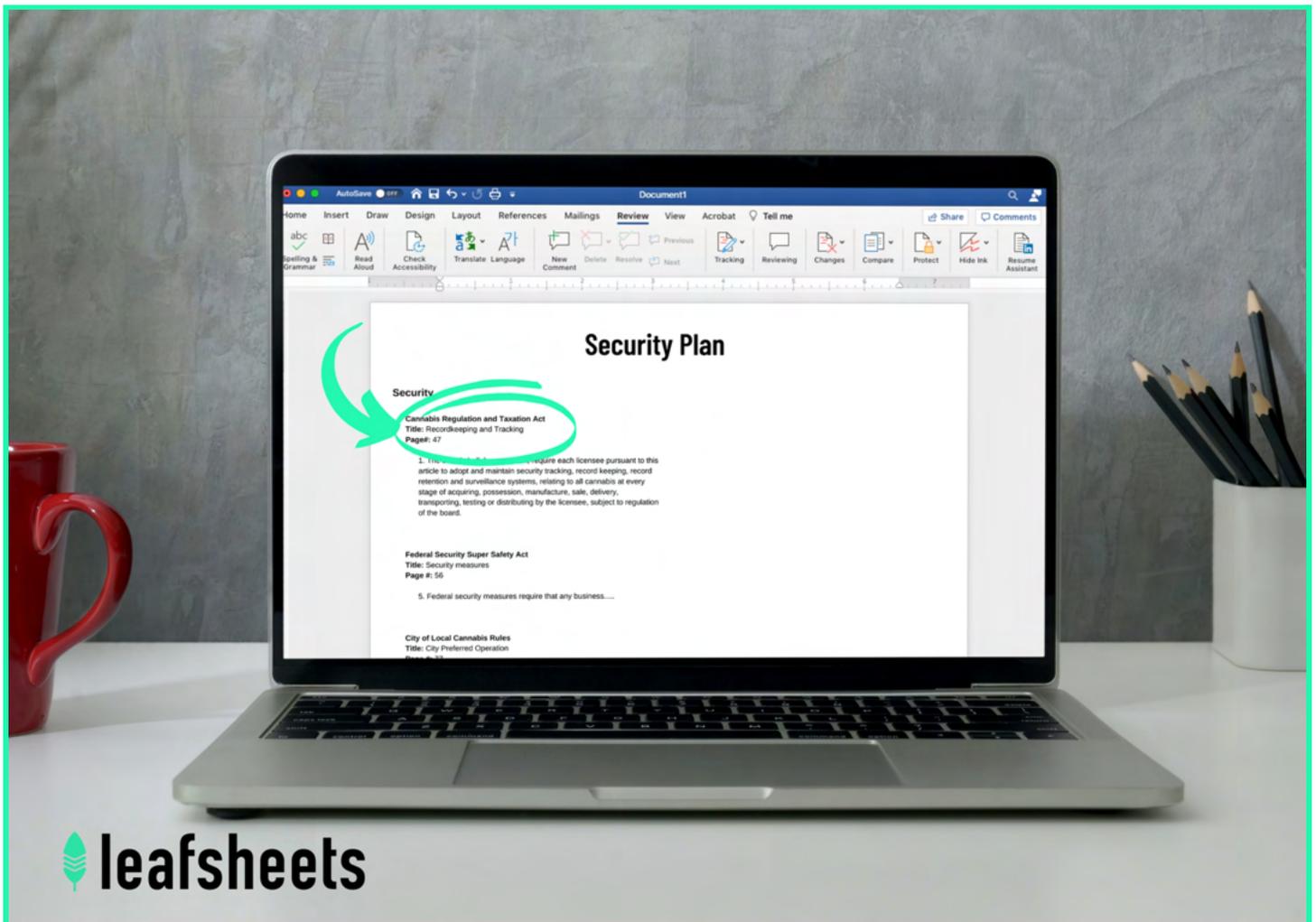
Also do this:

Underline the section title, page number, and the search word each time it is mentioned in the pasted text.



Like this example of completed Step 6:

The notes document will start to look like an outline.



### Step 7: Repeat

Complete the above steps for each search word on your list before moving on to the next step.

# CREATING CITATIONS

## Step 8: Cite

This part might take some time but trust us, it will make your final sheets all the stronger.

Here you'll be creating a citation for every piece of regulation that you've posted into the notes document. You'll need to look at the regulations for this step. These citations will come in handy once you get to editing your sheet.

### → First do this:

For each pasted piece of regulation in your notes document:

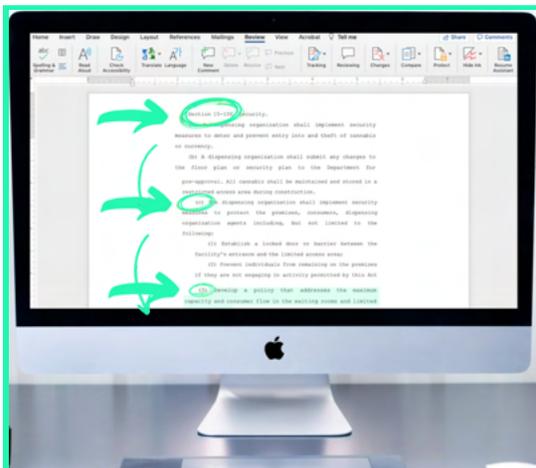
- Go to the page where the section is located in the regulation (you noted the page number so this should be easy to do).
- Reverse engineer the citation. Start at the bottom of the text and work your way up.
  1. What number or letter is this text associated with? Write that number or letter down.
  2. Is that number or letter a sub section of another numbered or lettered section? Write that number or letter down. (Keep asking this question and writing the number or letter until you reach the primary number or letter of the piece of the regulation which you are citing).
  3. Write the name of the section/article/title
  4. What's the regulation name?

### → Then do this:

Structuring the citation

Write the citation for each section using the answers to questions 1-4 above, and using those answers structure citations like this:

Answer to question 4, Answer to question 3 (answer(s) to question 2)(answer to question 1)



### Example of this process

1. What number or letter is this text associated with? : (3)
2. Is that number or letter a sub section of another numbered or lettered section? : **Yes: (c)**
3. Write the name of the overall section/article/title: **Section 15-100**
4. What's the regulation name? **The Important Information Act**



The citation for this example would be :

## The Important Information Act, Section 15-100(c)(3)

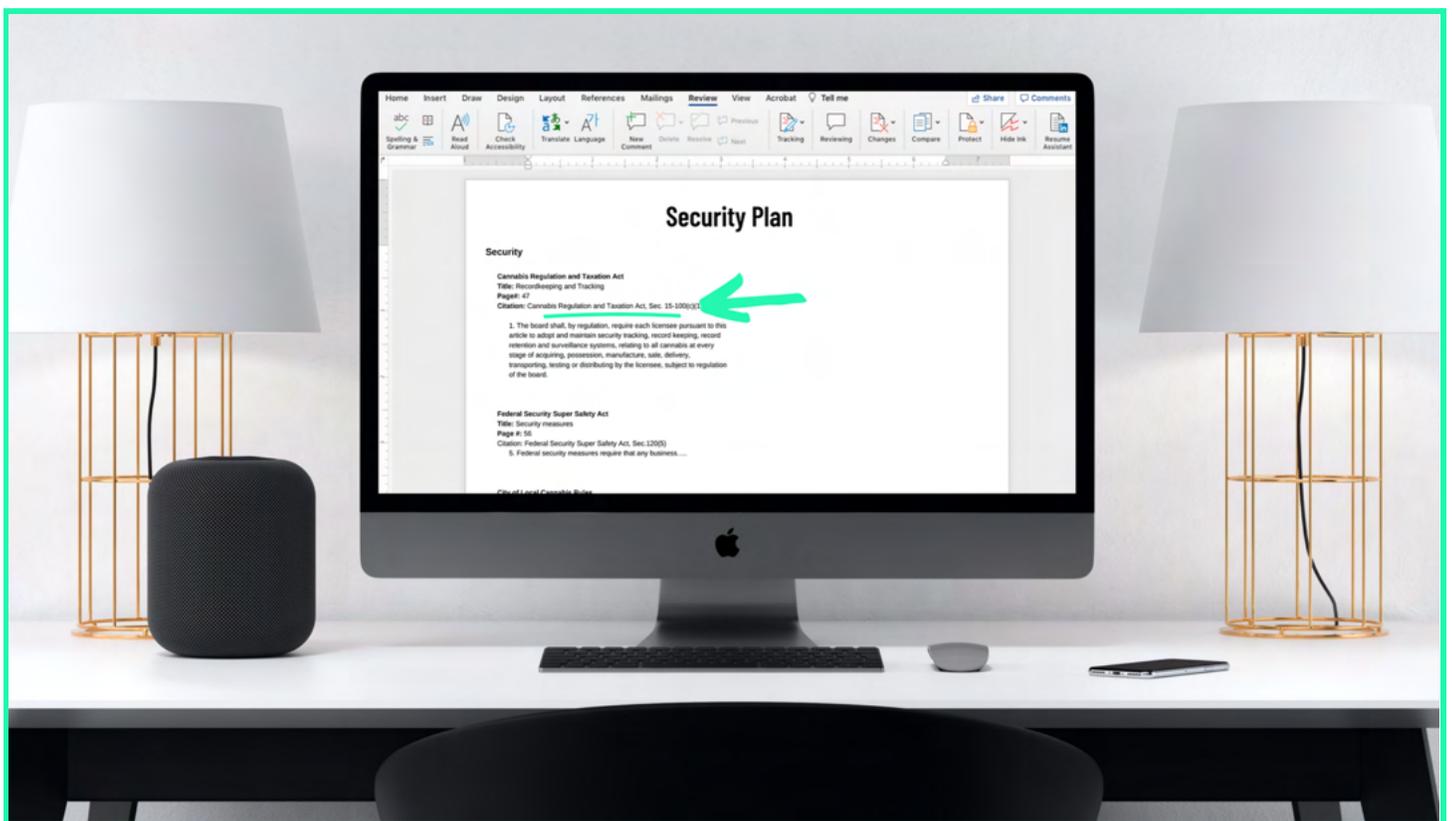
---

➔ Next do this:

For each section of a regulation that you have pasted in your notes, take note of its citation(s), preferable next to the section title and page number.

➔ Like this example of completed Step 8 document:

Your notes document will start looking like this



**If creating citations is absolutely too much for you**

Regulations have a lot of sections and subsections, so if you find it difficult at first to navigate your way up the document to record each sub section number and letter, don't get too frustrated. Also, if this step of the process is totally overwhelming and navigating the regulation to find the subsection

letters and numbers are driving you crazy, at the very least cite the regulation name and section name.

## Step 8.5: Complex Citation Scenarios

For each regulation name under each key word, you will likely have pasted sections of varying structures and lengths. Below are three different scenarios that you might face when creating citations for lengthier portions – each with an example of how to approach the situation.

### Citation Scenario 1 : Citing a single piece of a complex portion of a regulation



*Example:* The text highlighted in green in the image below is the text you have pasted in your notes document, so you only want to cite that piece of the text, (not numbers 1 and 2).

To reverse engineer the citation:

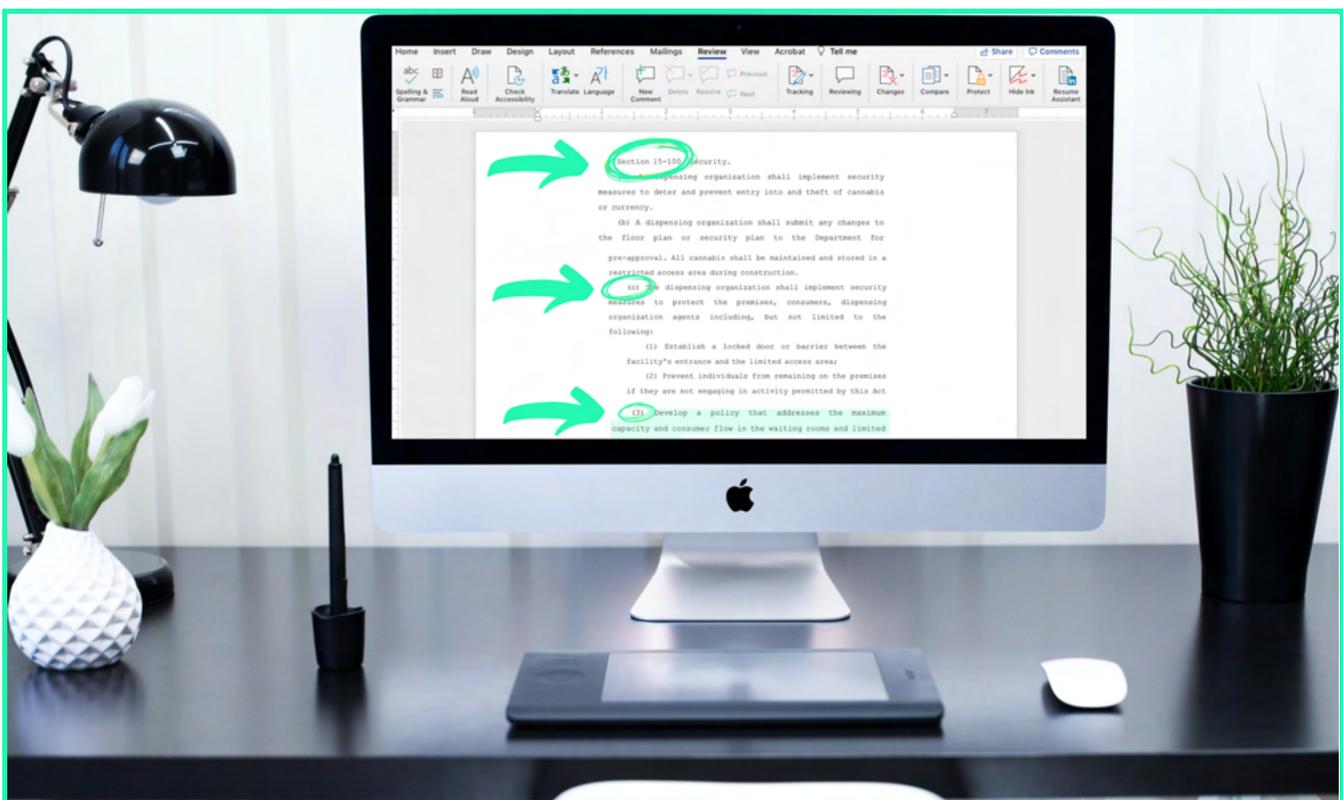
1. What number or letter is this text associated with? : **(3)**
2. Is that number or letter a sub section of another numbered or lettered section?:  
Yes: **(c)**
3. Write the name of the overall section/article/title: **Section 15-100**
4. What's the regulation name? **The Important Information Act**

Structure the citation like this:

Answer to question 4, Answer to question 3 (answer to question 2)(answer to question 1)

The citation for this example (image below) would be :

**The Important Information Act, Section 15-100(c)(3)**



## Citation Scenario 2: Citing multiple items of a section of regulation as a whole

*Example:* You have a large portion of regulation in your notes document, that portion includes multiple sub sections, and you want to use the entire piece of regulation, including all subsections.

For instance, if the text highlighted in green in the image below was pasted in your notes and you wanted to include all of the information together in your sheet.



How to handle Citation Scenario 2: Plan on using the whole section of text

To reverse engineer the citation for the text highlighted in green in the image below:

1. What number or letter is this text associated with? : (1) , (2) , (3)
2. Is that number or letter a sub section of another numbered or lettered section?:  
Yes: (c)
3. Write the name of the overall section/article/title: Section 15-100
4. What's the regulation name? The Important Information Act

Citation structure:

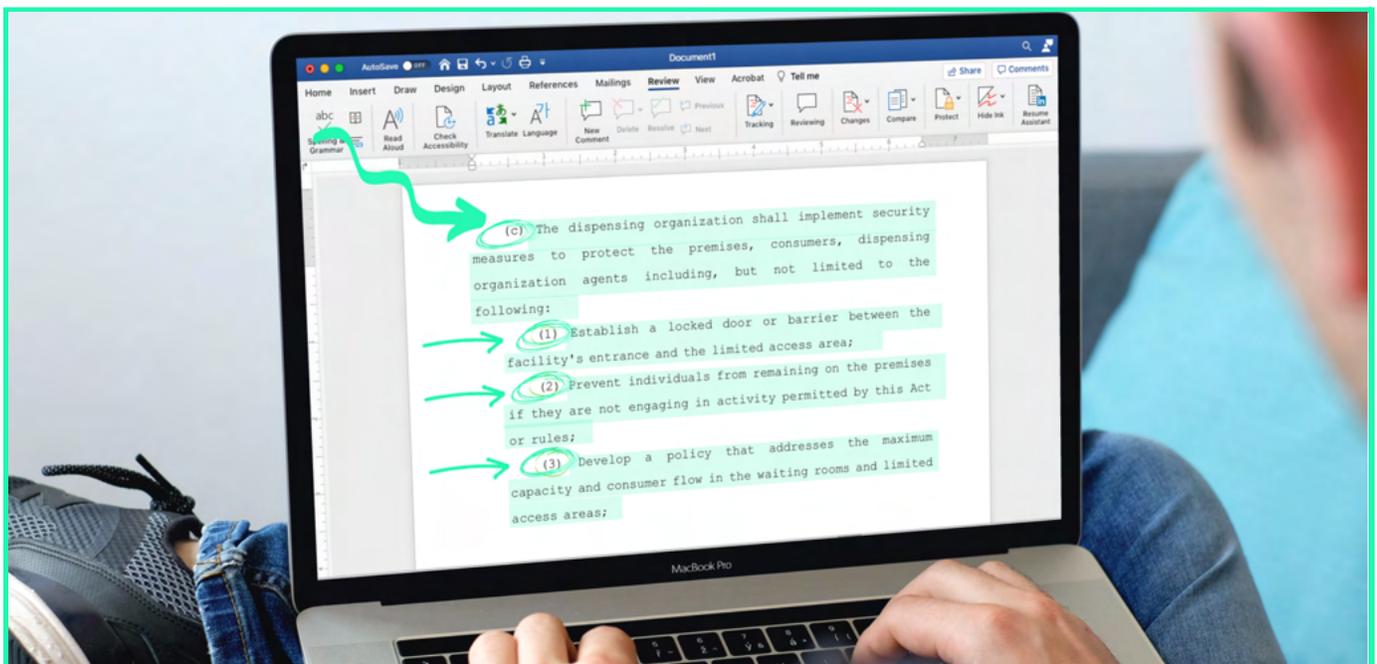
Answer to question 4, Answer to question 3 (answer to question 2)(answer to question 1)

**OPTIONS** Option 1: Cite each subsection concurrently, separated by semicolon:

The Important Information Act, Section 15-100(c)(1);(2);(3)

**OPTIONS** Option 2: Cite subsections as a range:

The Important Information Act, Section 15-100(c)(1-3)



### Citation Scenario 3: Citing multiple items of a portion of regulation, separately

You have a large portion of regulation in your notes document, that portion includes multiple sub sections, and you want to use each piece separately (this would happen if you wanted to use each piece of the section in a different section of your sheet).

For instance, if the text highlighted in green in the image below was pasted in your notes and you wanted to include points (1), (2) and (3) of subsection (c), separately.



**How to handle Citation Scenario 3:** Plan on using each piece of the section separately

*Example:* The text highlighted in green in the image below is the text you have pasted in your notes document. To reverse engineer the citation:

1. What number or letter is this text associated with? : **(1), (2), (3)**
2. Is that number or letter a sub section of another numbered or lettered section?:  
Yes: **(c)**
3. Write the name of the overall section/article/title: **Section 15-100**
4. What is the regulation name? **The Important Information Act**

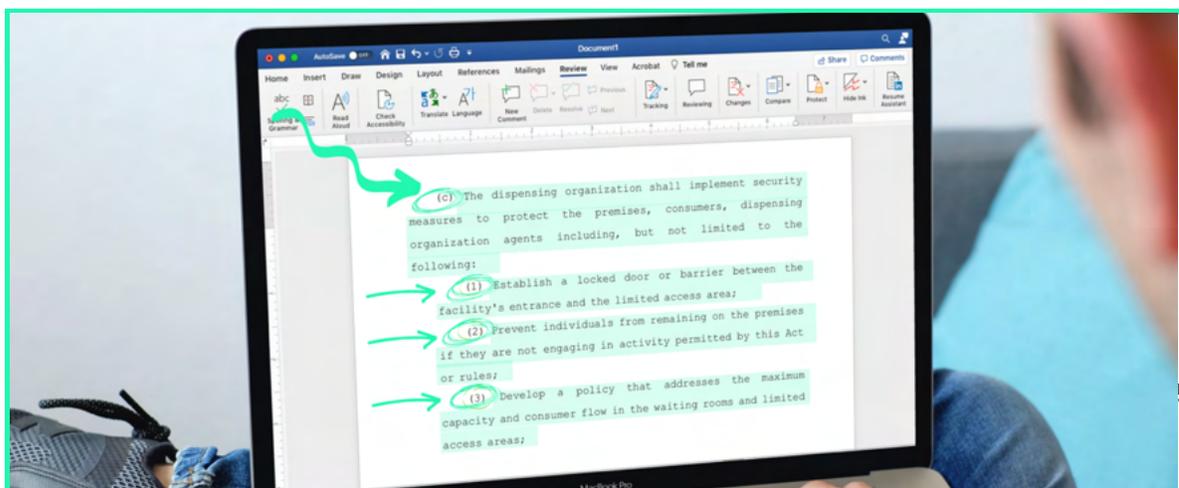
#### Citation Structure:

Structure the citation like this:

**Answer to question 4, Answer to question 3 (answer to question 2)(answer to question 1)**

Since you'll be citing each piece of this chunk of regulation separately, create a citation for each answer to question 1 above. So, in this example you would have 3 separate citations because the answer to question 1 includes (1)(2), and (3).

- ✓ **The Important Information Act, Section 15-100(c)(1)**
- ✓ **The Important Information Act, Section 15-100(c)(2)**
- ✓ **The Important Information Act, Section 15-100(c)(3)**



# CHECKLIST OF CITATIONS

## Step 9: Checklist



First do this:

At the end of your notes document, on a blank page, write "Check List" at the top of the page.



Then do this:

Make the title bold and large font (ex: 48)



Then do this

- Copy and paste every citation from the notes document (just the citations, not the portions of regulation that go with each citation).
- Copy and paste the list of regulations that the request for application specifically mentions (You should have created this list during your How to Dissect an application process)



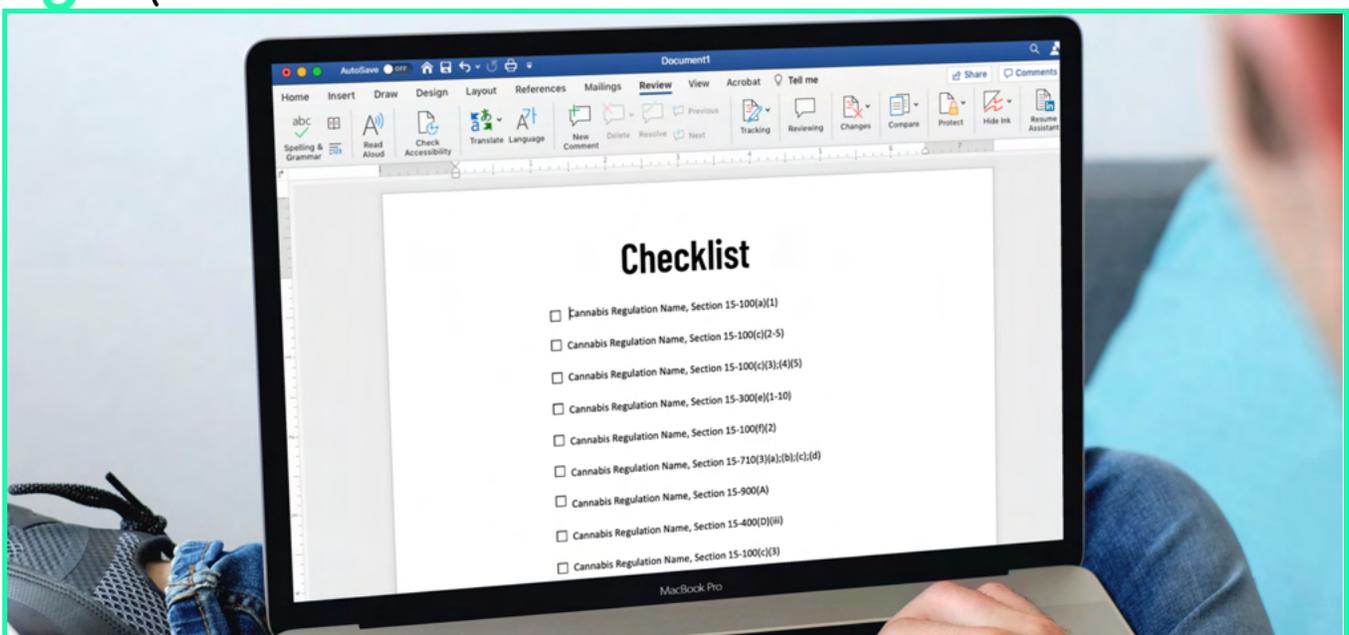
Also do this:

Place a check box next to each citation on the list. This list will come in handy *later*. It's useful to do this step at this point because you just made all of the citations.



Like this example of completed Step 9:

The last page (possibly the last few pages of your document if you have a lot of citations on the list) of your notes document should look something like this.



# TRANSLATE TO COMMON WORDING

## Step 10: Replace all

In your notes document do a – replace all– for the following words:

- Replace "shall" with "will"
- Replace "must" with "will"

## Step 11: Reword

You'll need to reword some pieces of each regulation section that you have pasted in your notes to make the wording sound more like a paragraph than like a regulation. Some common rewording includes:

- Reword each section that says anything similar to "the applicant" or "each applicant" and write "the company" or "our company" or "[Insert Company Name]" or "[Insert Company Identifier]."
- Reword anywhere that says "pursuant to this act" with "pursuant to [insert regulation name]"
- Reword anything that says something like "by the licensee" or "the licensee" and use the word "company" or the term "our company" or insert company name or identifier. Reword to whatever sounds most natural in the sentence to refer to your company instead of to "the licensee" (since your company is or will be the licensee).

## Step 12: Restructure lists (OPTIONAL)

If you want to get more technical with your structuring (which you don't have to do), Anywhere in the notes where a section of regulation has a list of actions that is not written as a numbered or lettered list but is rather written out in-line [reference the example below], make the list into a bulleted or numbered list. There is an exception to this, addressed after the following example of completed Step 12.

### Example of completed Step 12:

**The regulation :** The applicant shall maintain records for a period of at least five years, including but not limited to; (1) financial records, (2) inventory control records, (3) visitor logs, (4) theft reports, and (5) complaint logs.

**The reword & restructure:** The company will maintain all records for a period of at least five years, including but not limited to:

1. financial records
2. inventory control records
3. visitor logs

4. theft reports
5. complaint logs

### Complex scenario of Step 12

In this type of situation, you'll have to make a judgement call. The following portion of regulation has 2 lists which are in green lettering.

*Each licensee shall be required, pursuant to this article to adopt and maintain security, tracking, record keeping, record retention and surveillance systems, relating to all cannabis at every stage of acquiring, possession, manufacture, sale, delivery, transporting, testing or distributing by the licensee, subject to regulations of the board.*

The **first list** should be made into a bulleted or numbered list because it is a list of actions (a "what") to be performed. However, the second list does not need to be a numbered or bulleted list because in this case this list is not describing actions to be taken but is rather describing in which cases the list of actions from list 1 need to be performed (a "when"). It is essentially saying that when the company acquires, possesses, manufactures, sells, delivers, transports, tests or distributes cannabis, it needs to have and maintain security, tracking, record keeping, record retention and surveillance systems in place.

### Example of complex scenario of Step 12



#### The regulation:

Each licensee shall be required, pursuant to this article to adopt and maintain security, tracking, record keeping, record retention and surveillance systems, relating to all cannabis at every stage of acquiring, possession, manufacture, sale, delivery, transporting, testing or distributing by the licensee, subject to regulations of the board.

#### The reword & restructure:

When the company acquires, possesses, manufactures, sells, delivers, transports, tests or distributes cannabis, it will have and maintain systems in place when doing so, including:

- o security
- o tracking
- o record keeping
- o record retention
- o surveillance

### Alternatively

You may choose **not to** make lists into bulleted or numbered lists (meaning, you may opt-out of Step 12), in which case the restructure and rewording would look like this:

#### This regulation:

Each licensee shall be required, pursuant to this article to adopt and maintain security, tracking, record keeping, record retention and surveillance systems, relating to all cannabis at every stage of acquiring, possession, manufacture, sale, delivery, transporting, testing or distributing by the licensee, subject to regulations of the board.



**Would be reworded and restructured something like this:**

Pursuant to State Cannabis Regulation the company will adopt and maintain security, tracking, record keeping, record retention and surveillance systems, relating to all cannabis at every stage of acquiring, possession, manufacture, sale, delivery, transporting, testing or distributing.

**Step 13: Make it flow**

This is where some creative writing skills will come into play. For all of the portions of regulations that you have pasted in your notes, alter the writing so that it maintains the same meaning and facts, but flows more like a paragraph than like a regulation. It's difficult to give the exact method of doing this since it takes an understanding of the written language (and we aren't English 101 teachers), but here's an example to give you a sense of what we mean:

**The regulation:**

Each licensee shall be required, pursuant to this article to adopt and maintain security, tracking, record keeping, record retention and surveillance systems, relating to all cannabis at every stage of acquiring, possession, manufacture, sale, delivery, transporting, testing or distributing by the licensee, subject to regulations of the board.

**The rewritten version Option 1: Completed Step 12**



Pursuant to State Cannabis Regulation and Tax Act the company has developed a security plan for all business operations at every stage of acquiring, possession, manufacture, sale, delivery, transporting, testing and distributing cannabis by the company, subject to regulations of the board. The security plan includes a number of features which include and are not limited to:

- Facility, product and personnel security
- Product tracking
- Record keeping practices
- Record retention policies
- Surveillance

**The rewritten version Option 2: Opted out of Step 12**



Pursuant to State Cannabis Regulation and Tax Act the company has developed a security plan for all business operations at every stage of acquiring, possession, manufacture, sale, delivery, transporting, testing and distributing cannabis by the company, subject to regulations of the board. The security plan includes a number of features which include and are not limited to:

- Facility, product and personnel security
- Product tracking
- Record keeping practices
- Record retention policies
- Surveillance



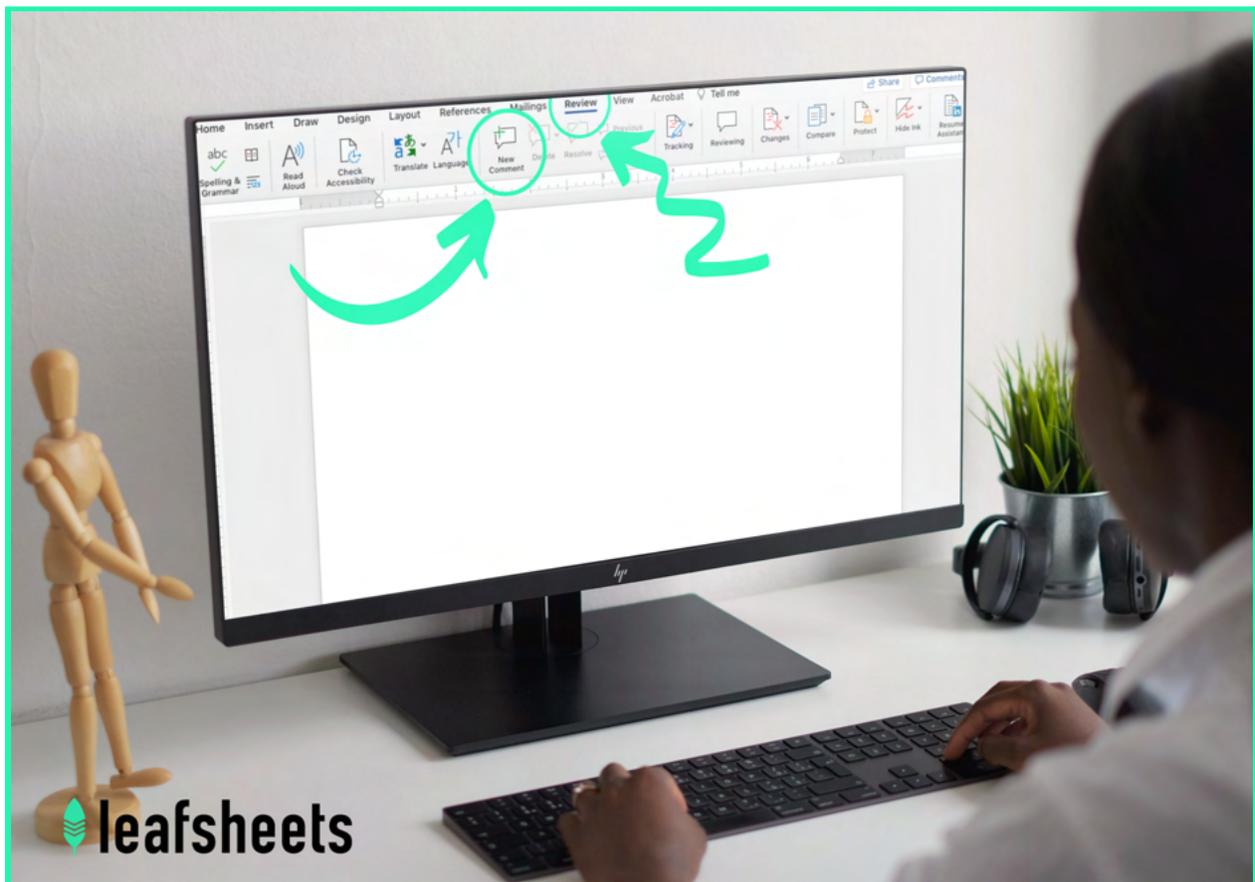
# PLANNING FOR REGULATION PLACEMENT

## Step 14: Review



First do this:

Go to review mode in your notes document so that you can insert comments



Then do this:

Insert a comment for each section of rewritten regulation within your notes document. These comments will help you once you start editing your sheet.

Each comment should at least include:

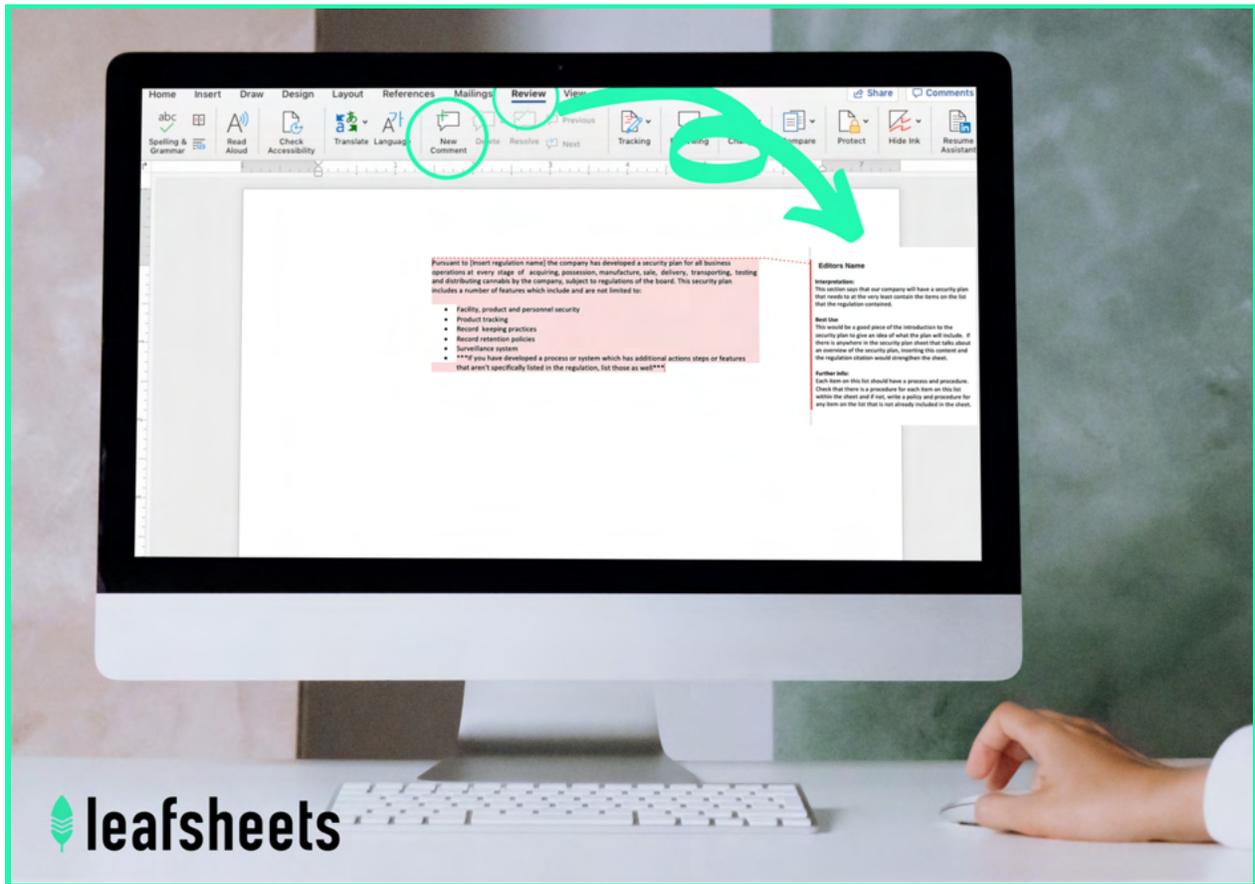
- Your laymen terms interpretation of what the text says
- Your initial idea of where the text would be most useful within the sheet you're editing

- o For example, the portion of regulation lists specific features of the required camera system, your note would say something like *"this should go somewhere discussing the features of the security system, or where the cameras are mentioned for the first time."*
- What other information you think could further substantiate whatever the writing claims the company will do.



Like this example of completed Step 14:

Your notes document should now have a set of comments for every portion of regulation. These notes will guide you when navigating your sheet to integrate this regulatory content.



### Step 15: Double check

Make sure you've done step 14 for the entire notes document.

# INTEGRATING REGULATIONS+SHEET

Finally! **YOU MADE IT!** Now you get to start actually editing the sheet, using all of that work you did in the notes.

## Step 16: The sheet

Open the sheet that you've done all the note taking for.

## Step 17: Search words

In your sheet, search for each of the key words on your list. Earlier you searched for these words in the regulations, this time search for them in your sheet.

## Step 18: Insert regulation and citation



### First do this:

Using your notes document, search through your sheet to see where each piece of rewritten and restructured regulatory information fits best.



### Then do this:

Paste the text from your document into the section where it makes most sense.



### And then do this:

Paste the citation of the section of regulation in the document near the text.



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There are 2 primary ways to place a citation near the text it relates to:

**OPTIONS**



**Option 1.**

At the start of the first sentence of the pasted regulatory information, write "Pursuant to [Insert citation],"

**Like this example of Option 1:**



Pursuant to [Insert Citation] the company has developed a security plan for all business operations at every stage of acquiring, possession, manufacture, sale, delivery, transporting, testing and distributing cannabis by the company, subject to regulations of the board. This security plan includes a number of features.

**OPTIONS**



**Option 2.**

Place the regulation on the line right below the pasted regulatory content. Italicize the regulation and right align it.

**Like this example of Option 2:**



The company has developed a security plan for all business operations at every stage of acquiring, possession, manufacture, sale, delivery, transporting, testing and distributing cannabis by the company, subject to regulations of the board. This security plan includes a number of features.

*[Cannabis Regulation Name, Section 15-100(c)(3)]*

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# REFINING THE SHEET

## Step 19: Clean Up the wording

As you're integrating regulations into the sheet, you may notice that there are instances when the flow of text needs some editing in order to truly make the regulatory language look like part of the sheet (rather than appearing like something that was clunkily pasted into the sheet).

You'll have to use your creative writing skills to make the wording tie together.

## Step 20: Get Detailed

A lot of these will be covered in your sheet since at this point you should have completed your integration of regulations. However, just to be certain, go through the sheet and make sure that every specification that pertains to the topic of the sheet, is mentioned in your sheet.



### Example 1: Technologies

Make sure this is in there

**Required specifications.** For example: If in the security regulations you find a requirement for a specific type of camera, you would want to make sure that in your sheet, where cameras are mentioned, that you state you will have cameras that follow the specifications (list the specifications). This information is likely already in your sheet because you integrated the regulations into your sheet.

Then add detail:

**Do some research:** For example, in the case of required camera features, you would need to search google for cameras that meet the specifications. Then you would name the camera system in your sheet where cameras are discussed, and describe some of its key features, including the features that match up with what the regulations require. If there's more description you can provide based

on the way the manufacturer describes the system on their website, add that description (if you have enough room in your page limit).

Then dive even deeper:

**Play it forward.** Add details that will show that you've really thought things through. For instance, in your security plan, specify how many cameras you'll have, how many lights you'll have, how many panic buttons you'll have, where the alarms/cameras/access control system buttons are located, where the doors will be placed, etc. Any technical piece that the regulation says you have to have, find the technology you'll use to meet the requirement and then detail how you'll use it.

### Example 2: Processes



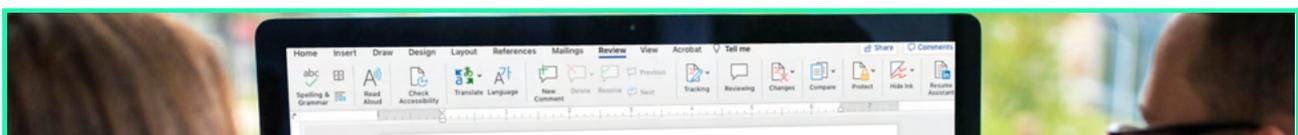
If in the regulations the state specifies that a company has to provide employee trainings once every 4 months, then within the sheet, if you haven't done so already, find a good place to add in a sentence stating that your company will provide trainings once every 4 months.

When mentioning required processes, it is key to elaborate on HOW you will adhere to the requirements (cover the who, what, where, when, and why — these are bolded in the example below). For instance, if your state requires that you train employees every 4 months using the state led training program, you could elaborate on that claim with something like:

We will train **all employees** using the **onboarding and training manuals** and in person trainings. The **Human Resources Manager** will be responsible for ensuring that all employees participate in training **every 4 months**. Employees will be notified when it is time for their training, and they will be provided with a scheduled time for completing the training. The employee training schedule will be managed by the Human Resource Manager **so that each staff member participates in the program** without the training time taking away from their usual work hours. The trainings will be held **in our multipurpose room** and a record will be kept in a training log which will include the name of each employee, when their training was completed and the next date they will be required to participate in training.

### Step 21: Check the Checklist

- Go to the checklist of citations that you made at the end of your notes document.
- Search the sheet for each citation to make sure that you included all of them.
- Check each regulation off the list as you find it in your sheet.



### **Step 22: Integrate Anything That Was Left Out**

If there is a regulation on the checklist that is not included in the sheet, integrate that citation into the document in the same manner you did for the rest of the regulatory pieces and their citations.

### **Step 23: Spelling**

Spell-check the document.



## **TAKE A BREAK**

### **Step 24: Rest**

Here we recommend stopping and either moving on to doing this entire process for the next sheet you have to edit, or go on with your day, and get a good night's sleep. Your brain has done a lot of work to get this far! Recharge.

## **FINAL READ THROUGH**

### **Step 25: Proofread**

After resting your brain, return to your sheet to proofread one more time with fresh eyes.

Fix any issues you find which may include restructuring, rewording, adding information or deleting unnecessary text. If something can be said more concisely, make it more concise.

**Ok...You're SO CLOSE!**



# READY TO GO

## Applicant Next Steps

If you're using the sheets for your state license application:

### 1. Identified or Non-identified

#### Non-identified

Many applications will ask that you submit a non-identified application. This means you need to make sure that identifying information is removed from your sheets including: names of anyone associated with your business, business names of any companies owned by the owners, the name of your company, addresses or other contact information of anyone associated with the business (owners, employees, investors), address of the business, etc.

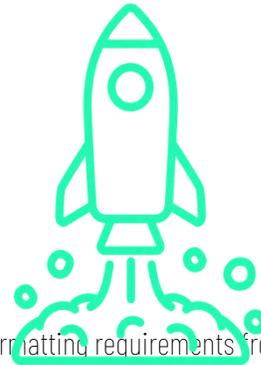
Use general terms wherever identifiable information would be, such as :

- Business Name
  - Company 1
- Owner names
  - Owner 1, Owner 2, Owner 3, etc.
- Address
  - Business Location 1, Business Location 2, Business Location 3, etc.
- Other Businesses Owned
  - Restaurant Business, Hotel Business, Landscaping Business, etc.

All of the identifying information will be included in official forms provided by the state, which are part of the application.

### Identified

If the application requests an identified version in addition to the non-identified version, then you'll want to have another version of the application which includes all of the identifying information.



## 2. Ensuring proper formatting of the document (sheet)

Make sure the entire document is formatted in line with any formatting requirements from the request for application. This may include:

- Cover page
- Margin size
- Font type
- Font size
- Page numbers
- Table of contents
- Word count
- Page count
- Document name
- File type (usually non-password protected .pdf)

## 3. Formatting application for submission

**Don't do this step until all pieces of the application are complete.**

The request for applications provided by the state will always specify how they want the application turned in. Some examples include printed paper organized into binders, one memory stick, multiple memory sticks, online. Make sure that **you do it properly, EXACTLY to their specifications.**

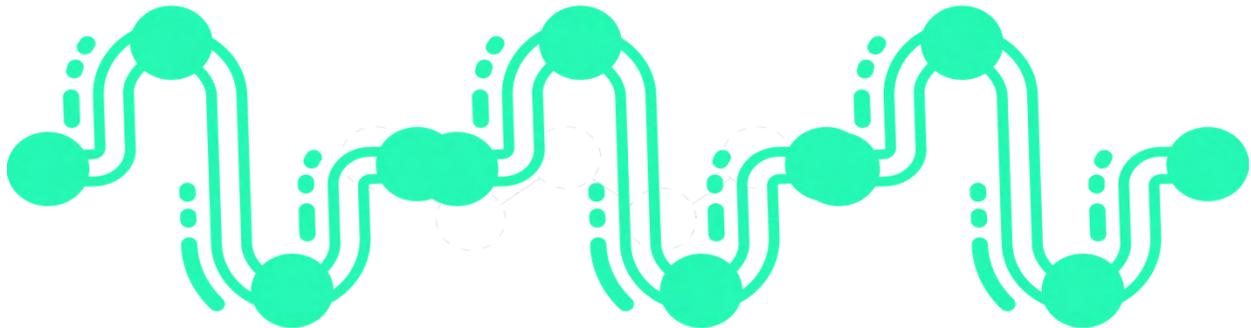
**Submitting the application in the wrong format could get you automatically disqualified.** If you can't follow directions to turn in an application properly, how will the state believe you can operate an entire cannabis business properly? So, **seriously**, make sure that you turn that application in exactly how they ask, and do it to the highest standard you can.

#### 4. Finalize other pieces of the application

Make sure all of your forms, floor plans, bios, resumes, and other pieces of information required for the application are completed and assembled correctly as well.

#### 5. Submit the application on time

If there is a deadline for turning in the application, try to turn it in before the last day. **Applications will not ever be accepted after the deadline**, so don't risk it.



## Operator Next Steps

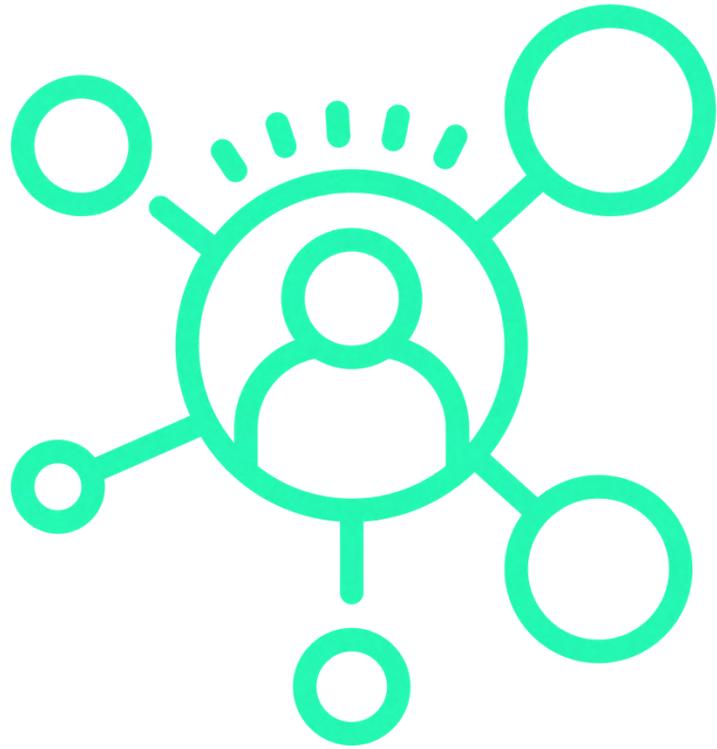
If you're an operator using these sheets as standard operating procedures, save the finalized sheets in two versions:

### 1. Version for Inspections

- Save the sheets in pdf format
- Name each pdf as the name of the sheet plus "inspection"  
Ex: "Waste Management Plan Inspection.pdf"
- Place all the pdf sheets into one folder named "Inspection SOPs [Insert date]"
  - This folder will be used any time state inspectors come by and want to see your standard operating procedures (SOPs). The .pdf format and the naming convention will make it easy for them to search your SOPs to ensure they're compliant.

### 2. Version for Internal Use

- Save the sheets in .doc format
- Name each pdf as the name of the sheet plus "internal" Ex: "Waste Management Plan Internal.pdf"
- Place all .doc sheets into one folder named "Working SOPs [Insert date]"
  - This folder will be where you have your editable SOPs (sheets) and can edit each sheet whenever necessary whether that's because of a change in a regulation or a change in company policy and procedure.



# You did it!

We're proud of you. Go be great.

