Metrc Support Bulletin

Bulletin Number: MT_IB_0025	**Distribution Date**:05/27/2021	**Guidance Bulletin**
Contact Point: Metrc® Support	**Subject**: Update on New Limit Tracking in Metrc	
Reason: Metrc is providing guidance on the tracking of multiple limits for patients.		

Greetings Metrc Users,

The DPHHS and Metrc previously released Bulletin 19 providing details into the Patient Status Lookup feature to support the monthly and daily limit tracking.

Metrc has also provided support through the Application Programming Interface (API) for Third Party Integrators (TPIs) to verify a Patient's Active/Inactive status along with their total multiple purchasing limits. Metrc released API Bulletin 80 to notify vendors of the update.
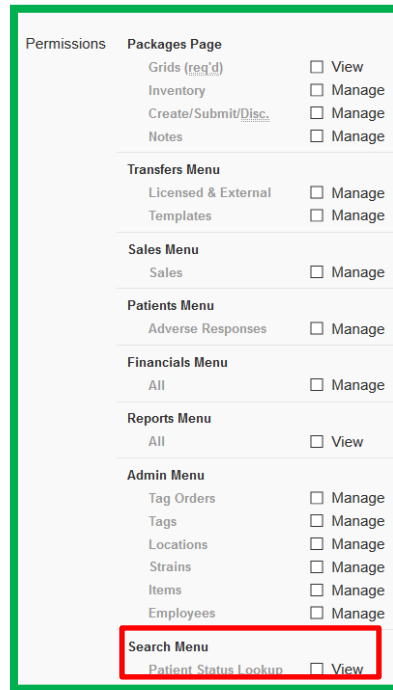
Within this bulletin, DPHHS and Metrc wanted to provide additional guidance and reminders around the process for using patient lookup and key things to remember prior to processing a sale.

Please see the following pages for additional details on this change.

Multi Limit Tracking Guidance

Users with the ability to conduct sales will need to ensure they are granted the appropriate permission by the Metrc admin, or an employee who can edit employee permissions at their facility.

The permission will be found within the "**Search Menu**" for **"Dispensaries"** only.

Permissions	Packages Page	
	Grids (req'd)	☐ View
	Inventory	☐ Manage
	Create/Submit/Disc.	☐ Manage
	Notes	☐ Manage
	Transfers Menu	
	Licensed & External	☐ Manage
	Templates	☐ Manage
	Sales Menu	
	Sales	☐ Manage
	Patients Menu	
	Adverse Responses	☐ Manage
	Financials Menu	
	All	☐ Manage
	Reports Menu	
	All	☐ View
	Admin Menu	
	Tag Orders	☐ Manage
	Tags	☐ Manage
	Locations	☐ Manage
	Strains	☐ Manage
	Items	☐ Manage
	Employees	☐ Manage
	Search Menu	
	Patient Status Lookup	☐ View

Once the permission is granted to a user, the patient status lookup will be the magnifying glass in the top right-hand side of the long navigational toolbar in Metrc.

When selecting the magnifying glass, you will be taken to the patient lookup grid that will be the same as the example below.

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It is important to note that when looking up a patient for sale, **both available amounts should be referenced prior to making the sale**. A patient should not be sold a full daily allotment if the calendar monthly allotments are less than what remains for the month.

Example of a Lookup with Monthly Greater Than Daily Available:

If a patient has their monthly allotment of Flower/THC available greater than their daily allotment, then a fully daily allotment can be sold to the patient at that point in time.

Example of a Lookup with Monthly Less Than Daily Available:

If a patient has their monthly allotment of Flower/THC available less than their daily allotment, then a full daily allotment **should not** be sold to the patient at that point in time. The maximum amount that should be sold would reflect the remaining amount for the lower available purchase amount in the monthly limit. For the example above, the sale should only be up to .5 Ounces of Flower or .0141 Ounces of THC. This is due to the fact if a full daily allotment was provided to the patient, then their monthly allotment would surpass what is allowed for the patient.

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Additional Key points about the patient lookup:

- Patients will be designated with either a Valid/Inactive/Expired RegistrationStatus. A sale **should never** occur to a Patient who is expired or inactive.

- A sale should never occur to a person who is not found within the patient look up function.

- Within the patient status lookup, providers **will not** be able to see the purchase details or previous purchase locations of the patient. Providers will only be able to view the total amount of product purchased to date.

- The calendar limit setting **will always have the purchase amount days set at 31** due to it being the longest month(s) during the year. There will continue to be a background update to reset on the 1st of the month regardless off the PurchaseAmount Days.

- The Purchase Amount Days set at .5 **will reflect the patient purchases within a 12-hour period that encompasses normal business hours.**

- Flower Allowed, Flower Purchased, and Flower Available will designate the Medical Marijuana Flower amounts. This will capture all items recognized as Marijuana Flower or Marijuana Concentrate Equivalency that is being sold.

- THC Allowed, THC Purchased, and THC Available will designate the Medical Marijuana Infused amounts. This will capture all items recognized as Marijuana Infused Products that is being sold.

- Patient's numbers must be **entered exactly as they appear** on their card and the sale **must be** recorded immediately upon purchase.

Please feel free to contact Support at support@metrc.com or 877-566-6506 with any questions.