Montana - Metrc Support Bulletin

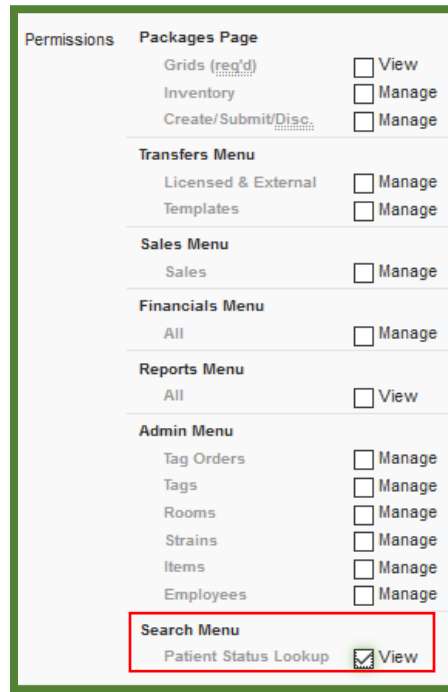| Bulletin Number: MT_IB_0011	Distribution Date: 10/22/19	Effective Date: 10/22/19
Contact Point: Support@metrc.com	Subject: Patient Status Lookup	
Reason: Metrc is providing guidance information on the patient status lookup for Providers to verify active/inactive patients and track limits.		

Greetings Metrc® Users,

In accordance with Montana Senate Bill 265 which permits Patients to purchase from any Provider; The DPHHS and Metrc are implementing some additional features to help facilitate these changes. The functionality being released is the Patient Status Lookup. On October 22nd, 2019, Providers will be able to verify the registration status of each patient that has an active or temporary patient card.

Please see the following pages for more information on the Patient Status Lookup feature.
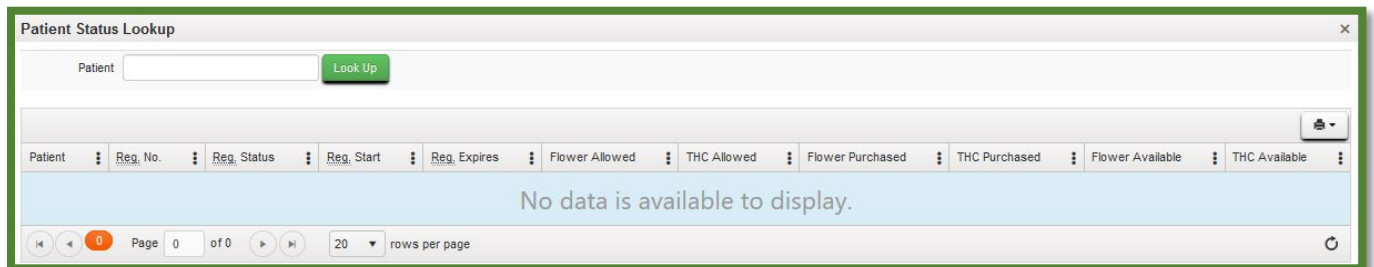
Patient Status Lookup

Once this has been implemented, employees will need to be 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.

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 toolbar.

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

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Notes about the patient lookup:

- Patients will be designated with an Active or Inactive Registration Status. A sale should never occur to a Patient who is expired or inactive.
- Providers will not be able to see the purchases or previous locations of the patient.
- **Flower Allowed, Flower Purchased, and Flower Available will designate the Medical Marijuana that is available. This will capture all items that are being sold, not just the flower product.**
- **A future bulletin will be released explaining the limits that are included within Metrc.**
- **Patient's numbers must be entered exactly as they appear on their card.**

Metrc – Industry Training

Metrc provides industry training & education workshops in person and online as well as training guides and videos.

- Register for workshops or classes online at: **www.metrc.com/montana**
- *You must attend at least one New Business (Level 1) class online before you may register for other classes.*
- *We recommend that all industry users take classes every 3-4 months to stay up to date on any new features or changes.*
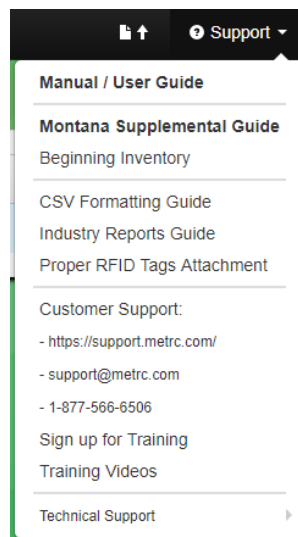
Online classes:
- Metrc New Business (Level 1) – All Facilities
- Metrc Advanced (Level 2) – All Facilities
- Metrc Advanced (Level 2) – Testing Labs (labs must request training via email to Support)

Metrc – Industry Support

Metrc provides live interactive support for industry users and licensees. This information can be found on our website, when logged into Metrc under your Support tab, and is listed below.

Check under the "Support" tab for additional resources.

Please be advised that the new *CSV Formatting Guide* and *Industry Reports Guide* are now located under the Support Tab.

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions or to request a copy of previous industry bulletins.