

Bulletin Number: MT_IB_014	Distribution Date: 5/15/20	Effective Date: 06/02/20
Contact Point: Support@metrc.com	Subject: Real Time Sales, Patient Status Lookup, and Purchasing Limits	
Reason: Metrc® is providing guidance on new functionality and requirements related to Patient Status Lookup & Patient Purchasing Limits to support untethering patients.		

Greetings Metrc Users,

The DPHHS and Metrc previously released Bulletin 11 providing details into the Patient Status Lookup feature to support verifying active and inactive patients. Currently, we are implementing some additional features to help facilitate the support for untethering patients.

The functionality being implemented for the Patient Status Lookup is patient purchasing limits and equivalencies on a monthly calendar basis. Starting on **June 2nd, 2020**, Providers will be required to record a patient sale in real time and patients will now have purchasing limits with equivalencies based on Flower and THC allotments that will reset on the 1st of every month. Metrc has also provided support through the Application Programming Interface (API) for Third Party Vendors (TPVs) to verify a Patient's Active/Inactive status along with their total purchasing limits.

DPHHS will be updating certain Item Categories to support the equivalency changes where users will be required to update their existing items within the following categories below to include Unit THC Content.

- Infused (edible)
- Infused (edible) (Micro Grow)
- Infused (non-edible)
- Infused (non-edible) (Micro Grow)

Please see the following pages for more information on these changes.

Patient Status Lookup

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 as shown in **Figure 1**.

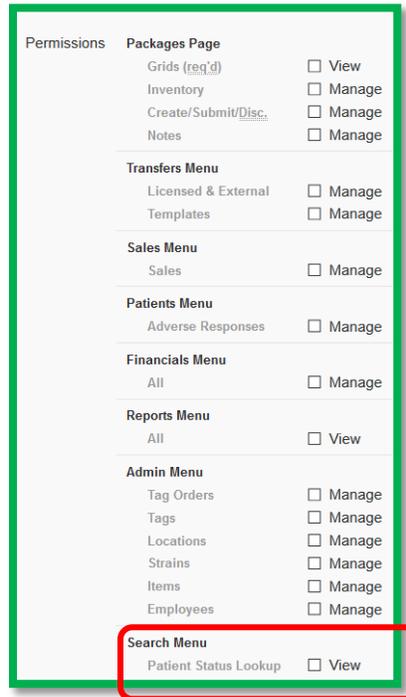


Figure 1: Employee Permission for Patient Status Lookup

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 as shown in **Figure 2**.



Figure 2: Magnifying glass for Patient Lookup

When selecting the magnifying glass, you will be prompted to a Patient Status Lookup action window that will be the same as the example below in **Figure 3**.

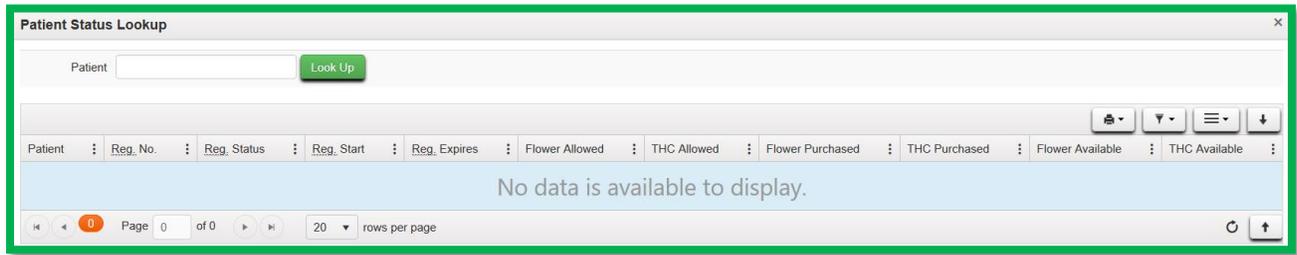


Figure 3: Patient Status Lookup

Key points about the patient lookup:

- Patients will be designated with either a Valid/Inactive/Expired 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 Flower amounts. This will capture all items recognized as Marijuana Flower or Marijuana Concentrate Equivalency that are 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 Product that are being sold.
- Patient’s numbers must be **entered exactly as they appear** on their card and the sale **must be** recorded immediately upon purchase (Real-Time).

Item Category Equivalencies

In Montana, Patient Limits are established by the prescribing Doctor and may be variable.

- A patient can typically purchase up to five ounces of Medical Cannabis on a monthly calendar basis. **Meaning the patient limits will reset on the 1st of every month.**
- Some Patients may have a different limit as prescribed by their Doctor.
 - **This limit is based on the equivalency factors below**
 - **One (1) ounce of marijuana flower is equal to:**
 - **800mg of marijuana infused products including edibles OR;**
 - **Eight (8) grams or eight (8) ml of marijuana concentrate**
- Depending on the item category, the amount deducted from the patient’s available limits is either the weight or THC content of the product sold within the “Flower Available” or the “THC Available”. These limits are linked meaning if 1 ounce of flower is sold, then 800mg of infused products would also deduct from the available amount to purchase.

Flower Available is based off the weight or “Unit Weight” sold in the following categories. These Item Categories will directly deduct the Flower Available for a Patient. Please note that any category equivalency that is recognized as Marijuana Flower is a 1 to 1 deduction. So, if one gram is sold, the available amount of flower available would reduce by 1 gram. Any category recognized as Marijuana

Concentrate is a 3.54 to 1 deduction. So, if one gram of concentrate is sold, the available amount of flower would reduce by 3.54 grams.

Category	Equivalency
Buds	Recognized as Marijuana Flower
Buds (Micro Grow)	Recognized as Marijuana Flower
Joint	Recognized as Marijuana Flower
Joint (Micro Grow)	Recognized as Marijuana Flower
Pre-Roll	Recognized as Marijuana Flower
Pre-Roll (Micro Grow)	Recognized as Marijuana Flower
Shake/Trim	Recognized as Marijuana Flower
Shake/Trim (Micro Grow)	Recognized as Marijuana Flower
Shake/Trim (by strain)	Recognized as Marijuana Flower
Shake/Trim (by strain) (Micro Grow)	Recognized as Marijuana Flower
Concentrate	Recognized as Marijuana Concentrate
Concentrate (Micro Grow)	Recognized as Marijuana Concentrate
Kief	Recognized as Marijuana Concentrate
Kief (Micro Grow)	Recognized as Marijuana Concentrate

The THC Available is based on the Unit THC Content of the medical marijuana infused within the item. Meaning an edible with 800mg of Unit THC Content would deduct the equivalency of an ounce of marijuana flower from the patient limits.

Category	Equivalency
Infused (edible)	Recognized as Marijuana Infused Products
Infused (edible) (Micro Grow)	Recognized as Marijuana Infused Products
Infused (non-edible)	Recognized as Marijuana Infused Products
Infused (non-edible) (Micro Grow)	Recognized as Marijuana Infused Products

Editing an Item with Unit THC Content

On **May 18th, 2020** DPHHS will also be updating the Item Categories below to support the equivalency changes where users will be required to update their existing items within the following categories to include Unit THC Content. In order to support the untethering of patients, licensees will need to update their existing items within these categories by **June 2nd, 2020**.

- Infused (edible)
- Infused (edible) (Micro Grow)
- Infused (non-edible)
- Infused (non-edible) (Micro Grow)

To update existing items within these categories, please see the following steps.

1. Go to the Items section of Metrc.
2. Within the Items section, find all items under the categories outlined above.
3. Once the item(s) that will need to be updated are found, select the “Edit Items” button.



Figure 4: Edit Items

4. Select the item(s) to be edited, the Edit Items action window will pop up as shown below in **Figure 5**.
5. Then enter the Unit THC Content for that item.

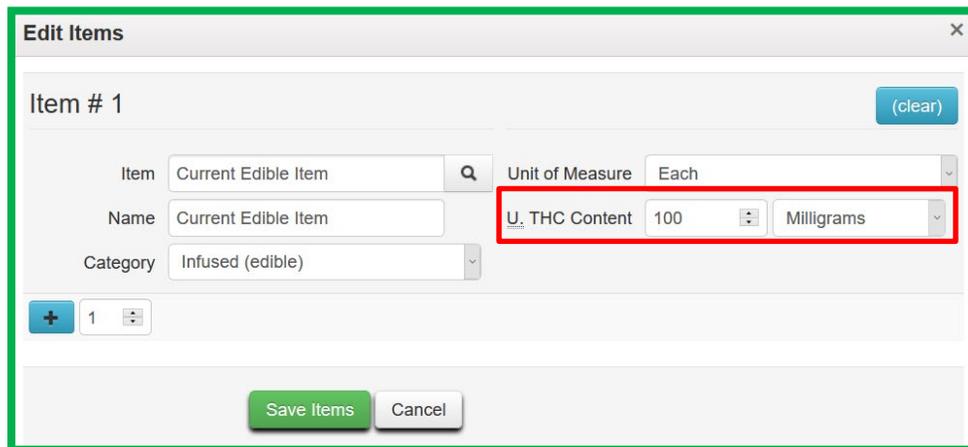


Figure 5: Editing Item to include Unit THC Content

5. After confirming accuracy of the information entered within the Unit THC Content, select the “Save Items” button.
6. The item will be updated accordingly, and the newly entered Unit THC Content will be visible within the item’s grid as shown in **Figure 6**.



Figure 6: Unit THC Content listed in Items grid

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” area for additional resources.



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