Metrc Support Bulletin

Bulletin Number: MT_IB_0015	**Distribution Date**: 5/28/20	**Effective Date**: 6/2/20
Contact Point: Metrc® Support	**Subject**: Upcoming Release in Metrc and CSV Formatting Guide Update	
Reason: Metrc is providing an update on our upcoming feature release related to reseting Patient Limits, Plant Batches, Additional information fields, Sales actions associated with finished packages, and an updated CSV Formatting Guide.		

Greetings Metrc Users,

This bulletin provides information on the latest enhancements to Metrc, which will become effective on **June 2nd, 2020**. The enhancements are listed below will be released on **June 1st, 2020**. **Metrc would also like to encourage licensees to reference the Untethering Update Information released within Bulletin #14.**

    I.   Untethering Limit Tracking Update

    II.   Additional Functionality for Plant Batches

    III.   Added "Packaged By" field to all Package popovers

    IV.   Added the "Strain" column to Lab Samples grids

    V.   Finished Packages must be unfinished before users can edit or record sales to the package

    VI.   Updated CSV Upload Guide

    VII.   Bulletin Archive Update

Detailed descriptions of each change are provided on the following pages:

Metrc Support Bulletin

Untethering Limit Tracking Update

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**. Additional information on these equivalencies and limits were outlined within Bulletin 14.

If a licensee experiences a patient whom they believe their status has not reset, the licensee needs to take the following steps:

1. Toggle to the Patient Status Lookup in Metrc
2. Enter the Patient Number exactly as it appears for the patient card number
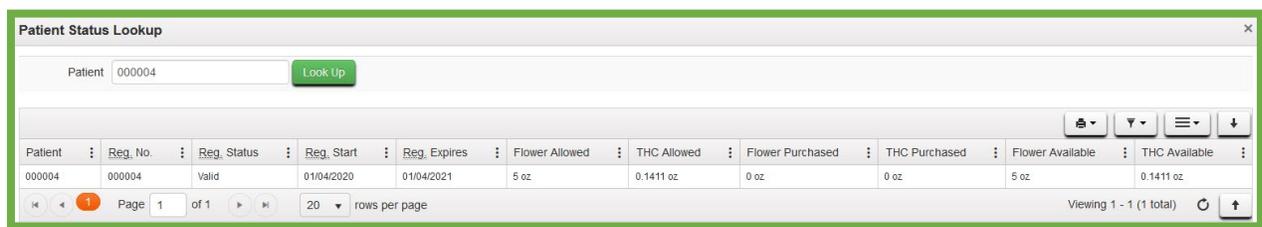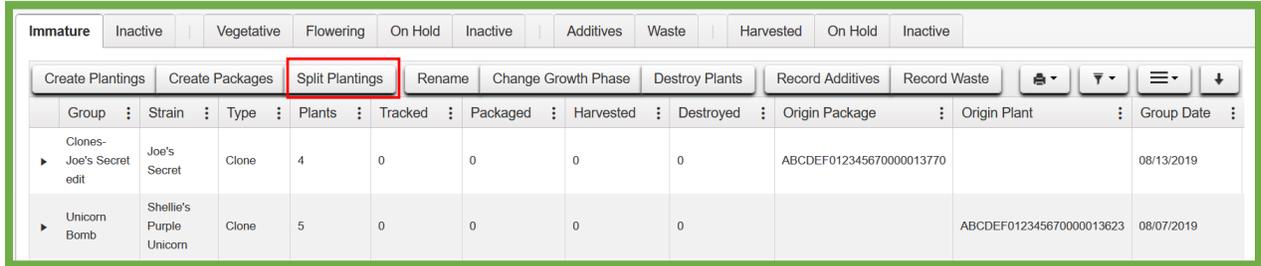3. Take a screenshot of the Patient Status Lookup

Patient Status Lookup

Patient: 000004 — Look Up

Patient	Reg. No.	Reg. Status	Reg. Start	Reg. Expires	Flower Allowed	THC Allowed	Flower Purchased	THC Purchased	Flower Available	THC Available
000004	000004	Valid	01/04/2020	01/04/2021	5 oz	0.1411 oz	0 oz	0 oz	5 oz	0.1411 oz

Page 1 of 1 — 20 rows per page — Viewing 1 - 1 (1 total)

Figure 1: Patient Status Lookup

4. Please email support@metrc.com with the screenshot and the date/time the screenshot was taken. **Please do not email in the same screenshot if you are stating the issue is occurring multiple times.**

5. If the issue is believed to be resolved prior to feedback from Metrc, it is also extremely helpful to send confirmation back to Metrc Support so this issue can properly be managed.

The Metrc team wants to thank all licensees who reach out and provided very helpful information on any issue or matter that arises. The Metrc team also wants to express appreciation to those who follow the steps above to ensure accurate and up to date information is in place so that is can properly be reviewed and corrective action can be taken based on the information provided.
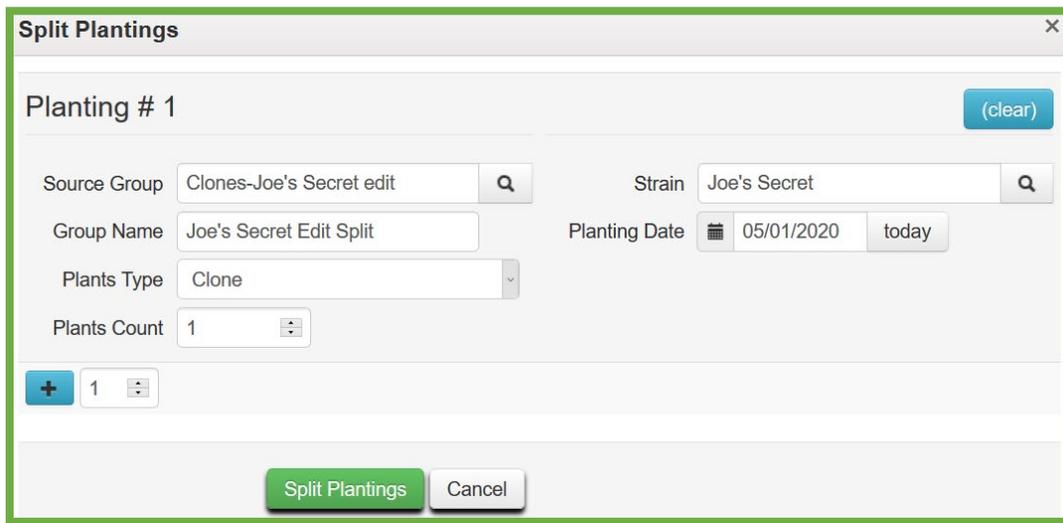
New Feature: Plant Batch Enhancements

Cultivation users are now able to "split" immature plant batches after creation, as seen in **Figures 2 and 3**. *Please note that there is no way to undo this action nor merge different plant batches.*

Figure 2: Select the Immature Plant Batch to Split

Once the user selects the split plantings option, they will see an action window where they will complete the information about the new planting, including plant count, plant batch name, Strain, and plant date. Once this information is completed, the user will select "Split Plantings" Button.

Figure 3: Split Plantings Action Window

New Feature: "Packaged By" Field in All Package Popovers

A popover grid is displayed by hovering the mouse over the 🔍 symbol anywhere in Metrc. In addition to all of the package and item information, newly added is a "Packaged By" field that will display the facility license number that created the package.
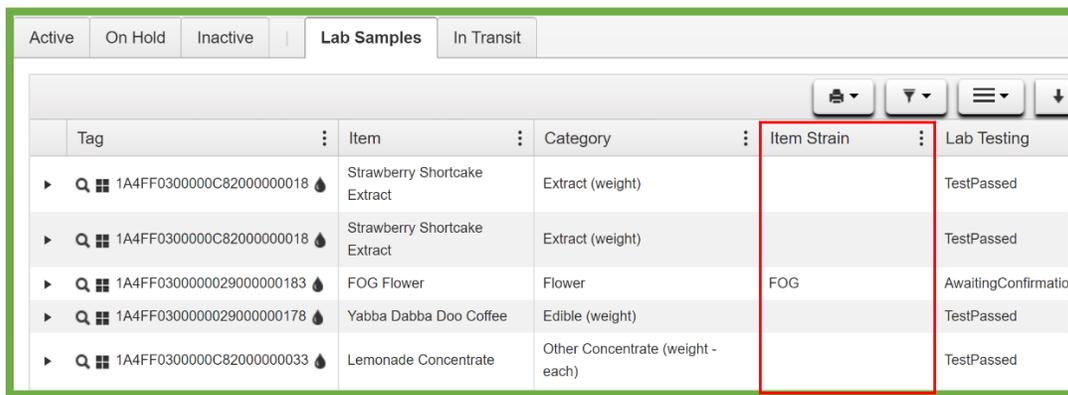

Figure 4: Package Popover Menu

New Feature: Lab Results "Item Strain" Field

Users within testing facilities who have the View Packages permission have access to a new Lab Samples tab on the Packages page. Newly added to the Lab Samples grid is the "Item Strain" field, which will populate with the Strain of the item, if applicable.

Figure 5: Lab Samples Grid "Item Strain" Field

New Feature: Editing and Recording Sales from Finished Packages

With this new update, users will no longer be able to record or edit sales receipts and deliveries from a finished package. Attempting to do so will result in the error message, as seen in **Figure 6.**

Contents from Package 1A4FF0300000026000000388 cannot be sold because it has been Finished.

Figure 6: Finished Package Sale Error

Unfinishing Packages

To unfinish a package, the user will navigate to the Inactive tab on the Packages screen and select the package with which they want to perform a sales action. Once selected, the user will use the "Unfinish" button as seen in **Figure 7** and confirm the package you are unfinishing in the action window that follows.

Figure 7: Unfinish Package

Once the package is unfinished, the user can make take any sales actions required. *Please note that if the sales actions are performed that results in a non-zero amount, the user will not be able to finish that package.*

Updated CSV Formatting Guide

Metrc Support has updated the CSV Formatting Guide, which can be found under the support tab on the top navigational bar, as seen in **Figure 8.**

Figure 8: CSV Formatting Guide

Metrc Bulletin Archive

Metrc is also excited to announce the release of our Bulletin Archive. By **May 29th, 2020** all Metrc Montana Bulletins will be published on the Metrc Montana Webpage.

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