

Bulletin Number: MT_IB_0015	<b>Distribution Date</b> : 5/28/20 <b>Effective Date</b> : 6/2/2					
Contact Point: Metrc <sup>®</sup> Support	Subject: Upcoming Release in Metrc and CSV Formatting Guide Update					
<b>Reason:</b> Metrc is providing an update of Limits, Plant Batches, Additional information	n our upcoming feature release ation fields, Sales actions associ	related to reseting Patient ated 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 2<sup>nd</sup>, 2020. The enhancements are listed below will be released on June 1<sup>st</sup>, 2020. <u>Metrc would also</u> 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:



## Untethering Limit Tracking Update

Starting on June 2<sup>nd</sup>, 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 1<sup>st</sup> 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

	соокир									
Patient	000004		Look Up							
									A.	·
Patient : F	Reg. No.	Reg. Status	Reg. Start	Reg. Expires	Flower Allowed	THC Allowed	Flower Purchased	THC Purchased	Flower Available	THC Available
000004 0	000004	Valid	01/04/2020	01/04/2021	5 oz.	0.1411 oz	0 oz	0 oz.	5 oz	0.1411 oz

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.* 

1	mm	ature Inac	tive	Vegetative	Flowering	On Hold	In	nactive		Additives	Wa	ste	Har	veste	d On Hold	Inactive		
	Cr	eate Plantings	Create F	Packages	Split Plantin	gs Ren	ame	Chang	e Gro	owth Phase	De	estroy Plar	its	Re	cord Additives	Record	Waste 🔒 🔹 🔻 🔻	<b>≡</b> • <b>+</b>
		Group :	Strain :	Туре :	Plants :	Tracked	: F	Packaged	:	Harvested	:	Destroye	ed	: 0	rigin Package	:	Origin Plant	Group Date
	×	Clones- Joe's Secret edit	Joe's Secret	Clone	4	0	0	)		0		0		AB	3CDEF012345670	000013770		08/13/2019
	Þ	Unicorn Bomb	Shellie's Purple Unicorn	Clone	5	0	0	)		0		0					ABCDEF012345670000013623	08/07/2019

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.

Split Plantings	5					×
Planting # 1					[	(clear)
Source Group	Clones-Joe's Secret edit	Q	Strain	Joe's Secret		٩
Group Name	Joe's Secret Edit Split		Planting Date	<b>m</b> 05/01/2020	today	
Plants Type	Clone	~				
Plants Count	1					
+ 1 🗈						
						-
	Split Plantings Ca	incel				

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  $\bigcirc$  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.

					Diablo	lower	
<b>F</b> (	۹	1A4FF0300000026000	000395				
		Type Product Unit Volume		Unit Volume	N/A	Product Requires Remediation	No
	⊂, ≣	Source Harvest(s)	N/A	Unit Weight	1 oz	Contains Remediated Product	No
		Source Package(s)	N/A	Unit Quantity	N/A	Administrative Hold	No
▶ (	۹.	Location	N/A	Item Serving Size	N/A	Packaged By	A11-0000002-LIC
		Location Type	N/A	Item Supply Duration Days	N/A	Packaged Date	05/01/2020
		Patient	N/A	Quantity	10 ea	Received Date	N/A
	u, ∎	Item	Burnt Brownies	Note	N/A	Received From License	N/A
		Item From License No.	N/A	Production Batch	No	Received From Facility	N/A
<b>&gt;</b> (	٩	Item From Facility	N/A	Trade Sample	No	Status	Active
		Category	Edible (weight - each)	Donation	No		
▶ (	Q. 🛾	Item Strain	N/A	Source Package Donation	No		
		Unit CBD Percent	N/A	Donation License No.	N/A		
	4	Unit CBD Content	N/A	Donation Facility	N/A		
F (	۹.	Unit CBD Content Dose	N/A	Initial Lab Testing	NotSubmitted		
		Unit THC Percent	N/A	Lab Testing	NotSubmitted		
▶ 0	0.	Unit THC Content	N/A	Lab Testing Date	05/01/2020		
		Unit THC Content Dose	N/A	Process Val. Sample	No		

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.

Activ	ve On Hold Inactive La	b Samples In Transit			
				<b>.</b>	+
	Tag	Item :	Category :	Item Strain	Lab Testing
Þ	Q III 1A4FF0300000C8200000018	Strawberry Shortcake Extract	Extract (weight)		TestPassed
•	Q III 1A4FF0300000C8200000018	Strawberry Shortcake Extract	Extract (weight)		TestPassed
•	Q 🔡 1A4FF03000002900000183 💧	FOG Flower	Flower	FOG	AwaitingConfirmatio
	Q 🔡 1A4FF030000029000000178 💧	Yabba Dabba Doo Coffee	Edible (weight)		TestPassed
×	Q III 1A4FF0300000C8200000033	Lemonade Concentrate	Other Concentrate (weight - each)		TestPassed

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 1A4FF03000002600000388 cannot be sold because it has been	×

#### 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.

Active	On Hold	Inactive		In Transit								
Unfini	ish											
Ta	ag		:	Src. H's	:	Src. Pkg's	:	Location :	Patient	:	Item	:
<b>،</b> م	ABCDEF01	123456700000	14601					Storage Room			BHO Oi Cartridg 1 g	il ge

#### 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**.

Q - 💿 Support -
Manual / User Guide
Montana Supplemental Guide Beginning Inventory
CSV Formatting Guide Industry Reports Guide Proper RFID Tags Attachment
Customer Support: - https://support.metrc.com/ - support@metrc.com
- 1-877-566-6506 Sign up for Training Training Videos
Technical Support

Figure 8: CSV Formatting Guide

# **Metrc Bulletin Archive**

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

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