

Bulletin Number: MT_IB_0019	Distribution Date: 09/18/2020	Effective Date: 10/01/2020
Contact Point: Metrc® Support	Subject: Update on New Limit Tracking in Metrc	
Reason: Metrc is providing an update on our upcoming enhancement to track multiple limits for patients.		

Greetings Metrc Users,

The DPHHS and Metrc previously released Bulletin 14 and 15 providing details into the Patient Status Lookup feature to support the monthly calendar limit tracking. At this time, we are implementing some additional features to Help accurately track purchasing limits per MT statute.

The functionality being implemented for the Patient Status Lookup is multi limit tracking for patient purchasing limits and equivalencies. Previously, the system tracked monthly sales only. The new functionality will begin to track limits on a daily basis in addition to the existing monthly tracking.. Starting on **October 1st, 2020** Providers will be required to lookup both daily and monthly patient limits prior to executing a sale.

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 also released API Bulletin 80 to notify vendors of the update.

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

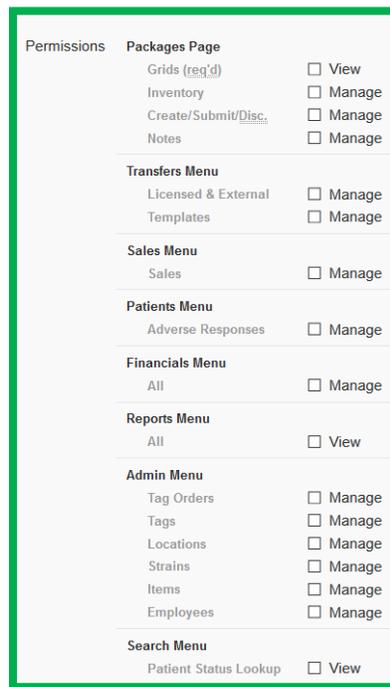
Multi Limit Tracking Update

Starting on **October 1st, 2020** Providers will now see that patients have two purchasing limits with equivalencies based on Flower and THC allotments that align with the calendar and daily tracking limits for each patient.

Additional information on these equivalencies and limits were outlined within Bulletin 14. **As a reminder DPHHS requires all Providers are recording their sales transactions into Metrc in real time.**

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.

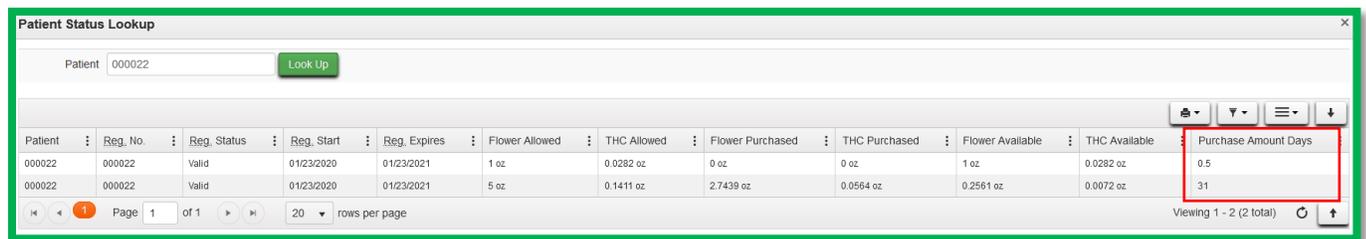
The permission will be found within the **“Search Menu”** for **“Dispensaries”** only.



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.



Patient	Reg. No.	Reg. Status	Reg. Start	Reg. Expires	Flower Allowed	THC Allowed	Flower Purchased	THC Purchased	Flower Available	THC Available	Purchase Amount Days
000022	000022	Valid	01/23/2020	01/23/2021	1 oz	0.0282 oz	0 oz	0 oz	1 oz	0.0282 oz	0.5
000022	000022	Valid	01/23/2020	01/23/2021	5 oz	0.1411 oz	2.7439 oz	0.0564 oz	0.2561 oz	0.0072 oz	31

Each patient will now have both a daily and monthly limit associated for their allowable purchase amounts that will be reflected within the Purchase Amount Days. The monthly calendar limit that users have seen will stay consistent as before and reset at the first of the month. The daily limit will reflect upon the patient’s purchases within the operating hours of a business day.

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.
- A sale should never occur to a person who is not found within the patient lookup 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 Purchase Amount 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 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 Products 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.

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.*

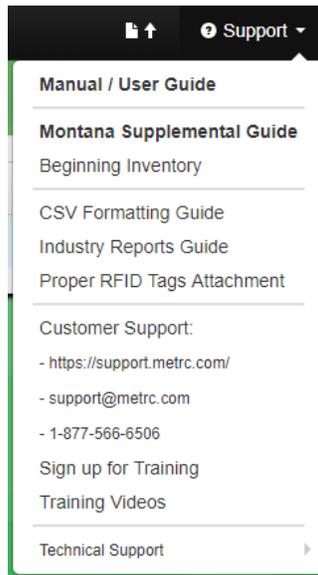
Online classes:

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