Metrc Support Bulletin

Bulletin Number: NV_IB_0042	**Distribution Date**: 11/11/20	**Effective Date**: 11/9/20
Contact Point: Metrc® Support	**Subject**: New External Patient Customer Type	
Reason: Metrc is providing an update on an upcoming configuration change regarding external patient sales for dispensaries and a new item category: Capsule/Tablet.		

Greetings Metrc Users,

The NVCCB and Metrc are providing information on an upcoming change to the available Customer Types a Retail/Medical Dispensary can record sales to. Starting on 11/9/20 a Dispensary will have the ability to record sales for non-Nevada residents with an active and valid, state issued, medical/patient card through the External Patient Sales function. This new feature is in addition to the Consumer and Patient Customer Types currently available in Metrc.

When selecting an External Patient as the Customer Type, it will be required to enter both the External Patient Number and Identification Method. This change will also be supported via the API or CSV upload functions. Metrc will be releasing an API bulletin for Third Party Integrators (TPI's) explaining the new available Customer Type.

Note that for the Identification Method to be valid it must meet the criteria below:

- Be an out-of-state, non-expired medical marijuana card/letter from your home state.
- Have additional non-expired supporting government issued photo ID (matching the state of the medical marijuana card)

Please see the following pages for additional details on this change as well as information on a new Item Category of Capsule/Tablet for all Production and Retail Licenses.

Recording an External Patient Sale

For the creation of a manual sales receipt, select the sales drop down from the navigation bar. Then select the "Receipts" option as seen in **Figure 1** to open the Sales Reciepts page.
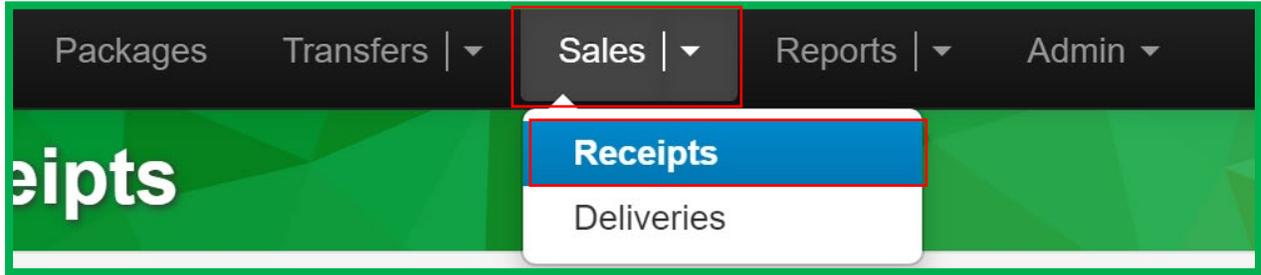
Figure 1: Creating a Sales Reciept

Once on the sales receipts page, select the "Active" tab in **Figure 2** to bring you to the active receipts grid, where there will be the ability to record receipts. Next, select the record receipts button to begin creating the new receipt as seen **in Figure 3**.
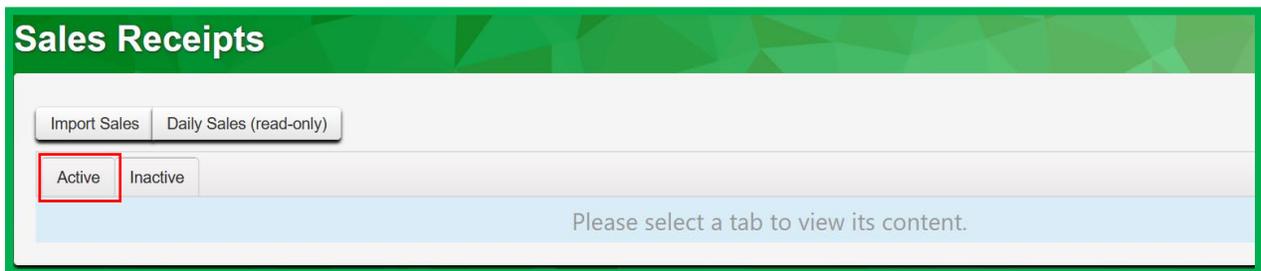
Figure 2: Sales Receipts Page
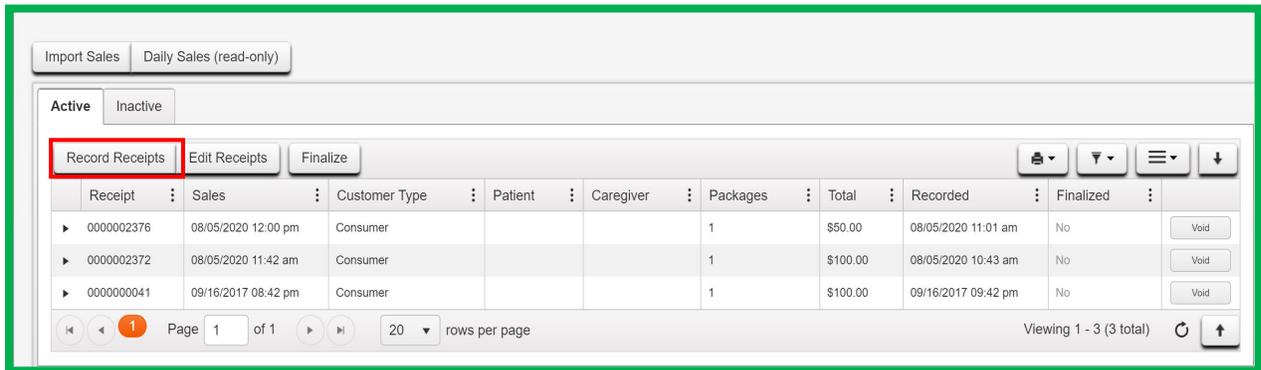
Figure 3: Record Receipts

The recording receipts action window will open, and enter the necessary information for the sale. When selecting the customer type, the External Patient button will prompt two fields, Patient Number, and Identification Method to open. Fill these fields with the the state designation and exact patient number (example – CA 12234)

When the information is recorded and correct, select the record sales receipts button and the receipt will be posted to the active receipts page where it could later be edited or finalized as seen in **Figure 5**.
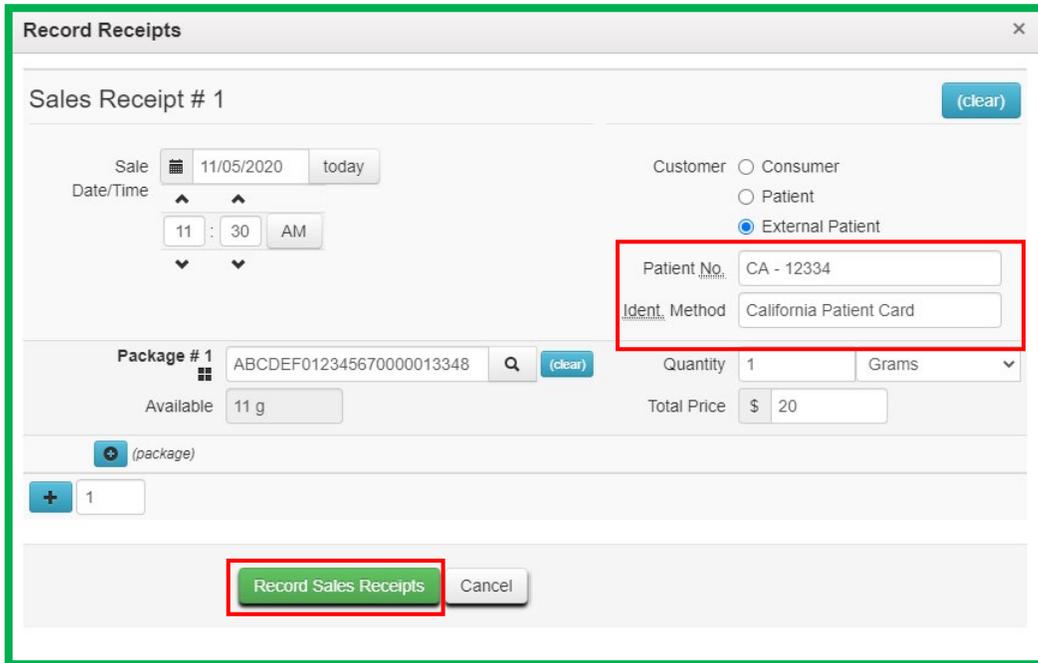
Figure 4: Selecting Customer Type: External Patient

Figure 5: Sales Receipts Grid

Recording an External Patient Sale via CSV Upload

For CSV Uploads, include the information in the following order in respective columns from A to H; Sales (date and time sale was made up to seconds), Customer type, External Patient Number (blank for caregiver number), Identification Method, Package ID, Quantity, UOM, Dollar amount.

Sales Date/Time	Customer Type	Patient	Caregiver Number	Identification Method	Package	Quantity	UoM	Price
1/23/2018 12:30	External Patient	12345		identification Method	ABCDEF012345670000011229	5	grams	20

Figure 6: CSV Format

New Item Category: Capsule/Tablet

NVCCB has created the Capsule/Tablet item category for all Dispensary and Production Licenses. The Capsule/Tablet item category is to be used **instead of** the Infused Non-Edible item category for any future packages. Below, also find guidance on how to create an item using this new item category.

Item Category	Type	Quantity Type	Default LTS	Str
▶ Capsule/Tablet	InfusedNonEdible	CountBased	NotSubmitted	No
Flowers/Buds				

Figure 7: New Capsule/Tablet Item Category

In order to create a new item, go to the Admin area and select Items. Once in the Items grid, select "Add Items" button as shown in **Figure 8**. This will open an action window to create a new item using the categories approved by NVCCB.

Items

Add Items   Edit Items

Item	Category	Type	Quantity Type	Default LTS	UoM	Strain
▶ Buds - AK-47	Bud/Flower	Buds	WeightBased	NotSubmitted	Grams	AK-47
▶ Buds - Blue Dream	Bud/Flower	Buds	WeightBased	NotSubmitted	Grams	Blue Dream

Figure 8: Items Menu

For your new Capsule/Tablet item(s) to be properly set up the THC content, correct Unit of Measure (count based – each), and the package quantity must be included in the action window when creating the new item name. In this example, the packages will have 10 Capsules per pack with 10 grams of THC per package as shown in **Figure 9**.
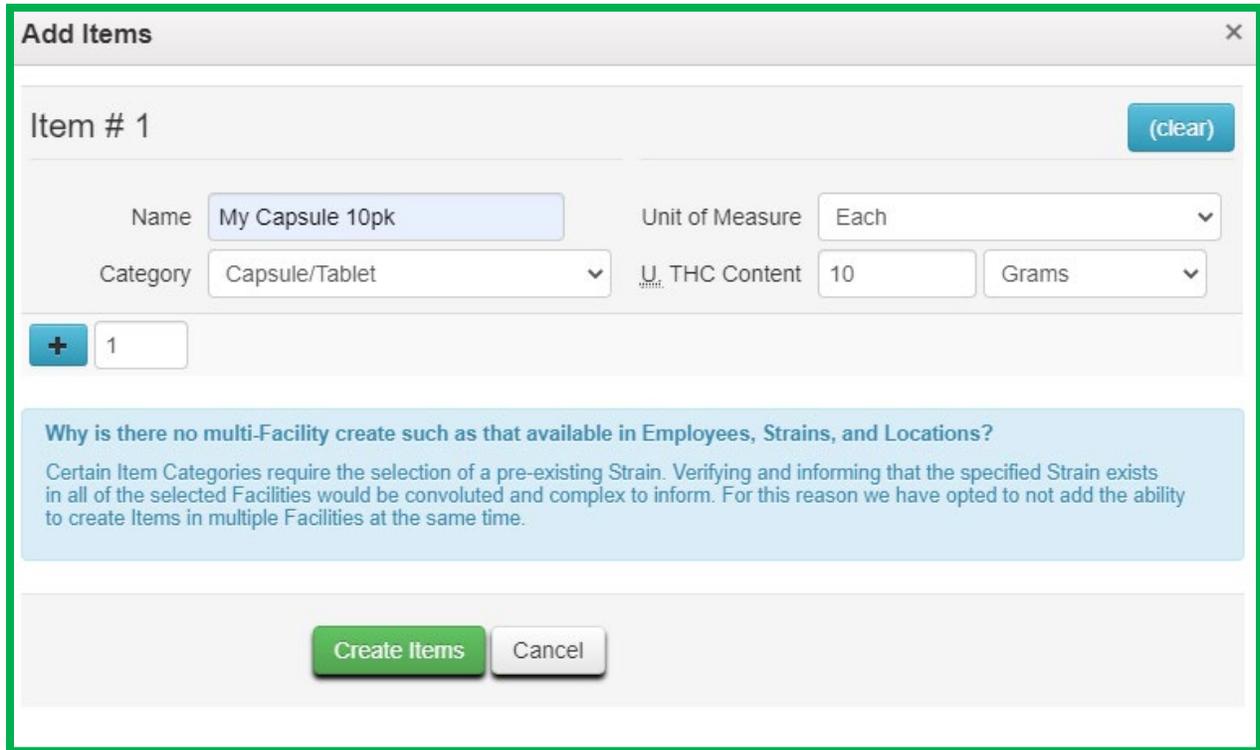
Figure 9: Creating a Capsule/Tablet Item Category

Now the new item can be seen in the items grid as shown below in **Figure 10**. Please note an item can't be edited once it has been used.

Figure 10: Created Capsule/Tablet Item

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