

Metrc Support Bulletin



Bulletin Number: DC_IB_0018	Distribution Date: 5/9/19	Effective Date: N/A
Contact Point: Metrc® Support	Subject: Reposting Bulletin #3 with New and Coming Soon Enhancements	
Reason: Metrc® re-release of Bulletin #3 explaining the feature release of the Patient Status Lookup. Due to further clarifying questions pertaining to out of District patients. Metrc® is reposting the bulletin and expanding further on how the system handles these patients.		

Greetings Metrc® Users,

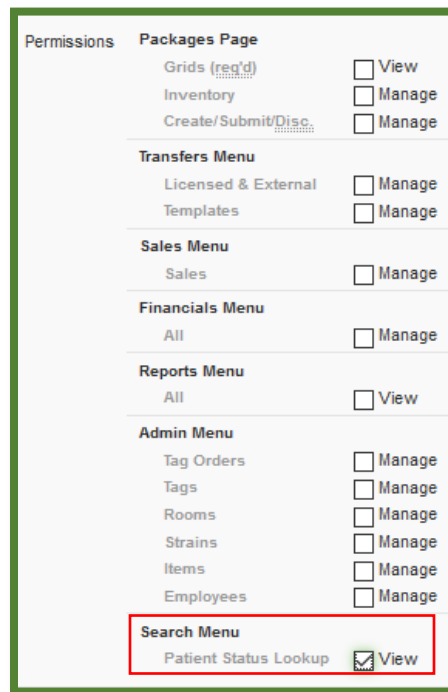
This bulletin is to provide clarification for out of District patients purchasing within licensed Dispensaries. Bulletin #3 was released once this feature was activated into Production in April, 2018. Due to some further questions, Metrc has expanded on Bulletin #3 and reposted as Bulletin #18. The additional clarification is underlined in red.

Metrc is also pleased to provide information on our upcoming enhancements within the software. The Create Packages and Reports sections of Metrc have been updated. Create Packages now includes the ability to input the number of packages the user would like to create, and the Reports section now includes a Sales Transactions Report. We also provide details on our coming soon enhancement to CSV row count restrictions.

Please find the following reposted bulletin and further descriptions on our new functionality below.

Software Update for Patient Statuses:

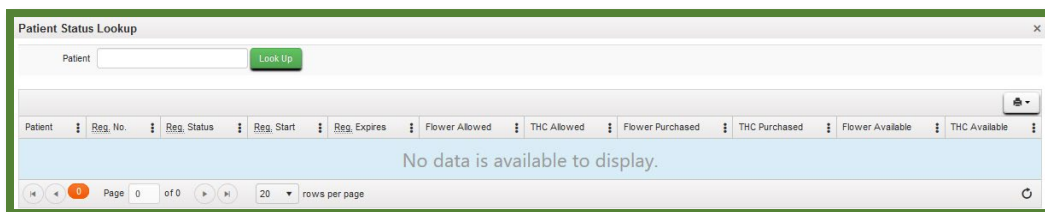
The Metrc team had released this bulletin via email to the dispensary managers, but to ensure industry wide communication. We are releasing the bulletin through Metrc® to explain the most recent update within the system to allow a Dispensary employee to view a Patient Status prior to making a sale. Now that this has been implemented, the employees will need to be granted the permission by the Metrc admin, or an employee who can edit employee permissions. 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.



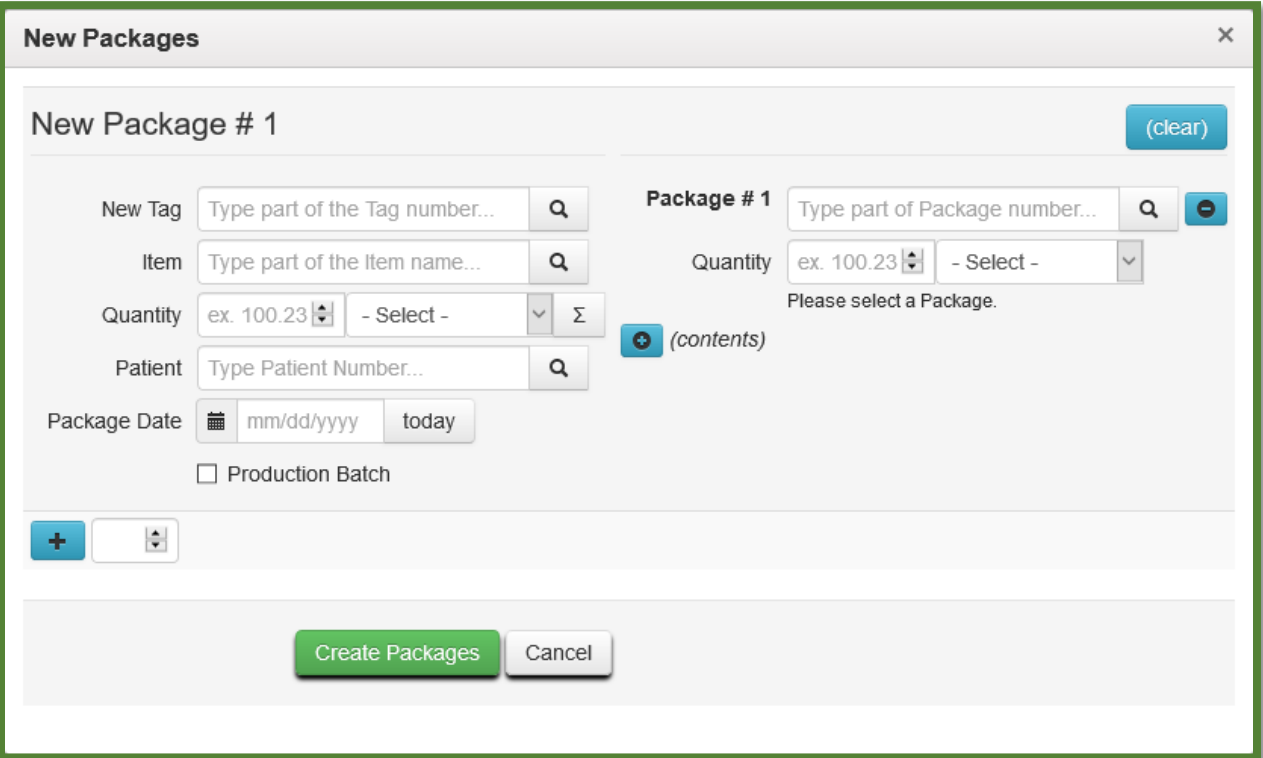


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Notes about the patient lookup:

- DC Patients will be designated with an active or inactive status. A sale should not occur to an inactive patient.
- Patients from outside of the District will only appear if they have made a previous purchase within the last thirty days in the District. Patient limits are automatically associated to a patient once a sale occurs. If a patient has purchased with the District, but their purchase has occurred outside of the last thirty days, then they should be treated as a patient with the same available amounts as a new patient would have. Dispensary agents will see these patients show as zero for their Flower Purchased and Flower Available.
- No dispensary will be able to see the purchases or previous locations of the patient, only the available amounts.
- Patients outside of the District will not have any information other than a patient number and Flower Allowed, Flower Purchased, and Flower Available.
- **Flower Allowed, Flower Purchased, and Flower Available will designate the Medical Marijuana that is available. This will capture all items that are being sold, not just the flower product.**
- **Patient's numbers must be entered exactly as they appear on their card.**

New Packages



The above pictured section of the Create packages view will allow the user to input the number of packages they need to create and Metrc will create that number below. Simply input the desired number and select the blue plus sign button. The Package template will appear at the top and can be used to complete the subsequent packages.

**** The user may also utilize the up and down arrows to input the desired number of packages.**

***** This functionality will be added to all dialogs at a later time.**

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New Packages

Template

Tag Sequence

Type part of the Tag number...

Q

✓

Quantity

ex. 100.23

✓

- Select -

✓

Item

Type part of the Item name...

Q

✓

Unit of Measure

- Select -

✓

Patient

Type Patient Number...

Q

✓

Package Date

mm/dd/yyyy

today

✓

Production Batch

✓

Mini-template: Add Content Packages

Package

Type part of Package number...

Q

✓

+

Quantity

ex. 100.23

- Select -

New Package # 1

New Tag

Type part of the Tag number...

Q

Item

Type part of the Item name...

Q

Quantity

ex. 100.23

- Select -

Σ

Patient

Type Patient Number...

Q

Package Date

mm/dd/yyyy

today

Production Batch

Package # 1

Type part of Package number...

Q

⊖

Quantity

ex. 100.23

- Select -

Please select a Package.

+

(contents)

New Package # 2

New Tag

Type part of the Tag number...

Q

Item

Type part of the Item name...

Q

Quantity

ex. 100.23

- Select -

Σ

Patient

Type Patient Number...

Q

Package Date

mm/dd/yyyy

today

Production Batch

Package # 1

Type part of Package number...

Q

⊖

Quantity

ex. 100.23

- Select -

Please select a Package.

+

(contents)

New Package # 3

New Tag

Type part of the Tag number...

Q

Item

Type part of the Item name...

Q

Quantity

ex. 100.23

- Select -

Σ

Package # 1

Type part of Package number...

Q

⊖

Quantity

ex. 100.23

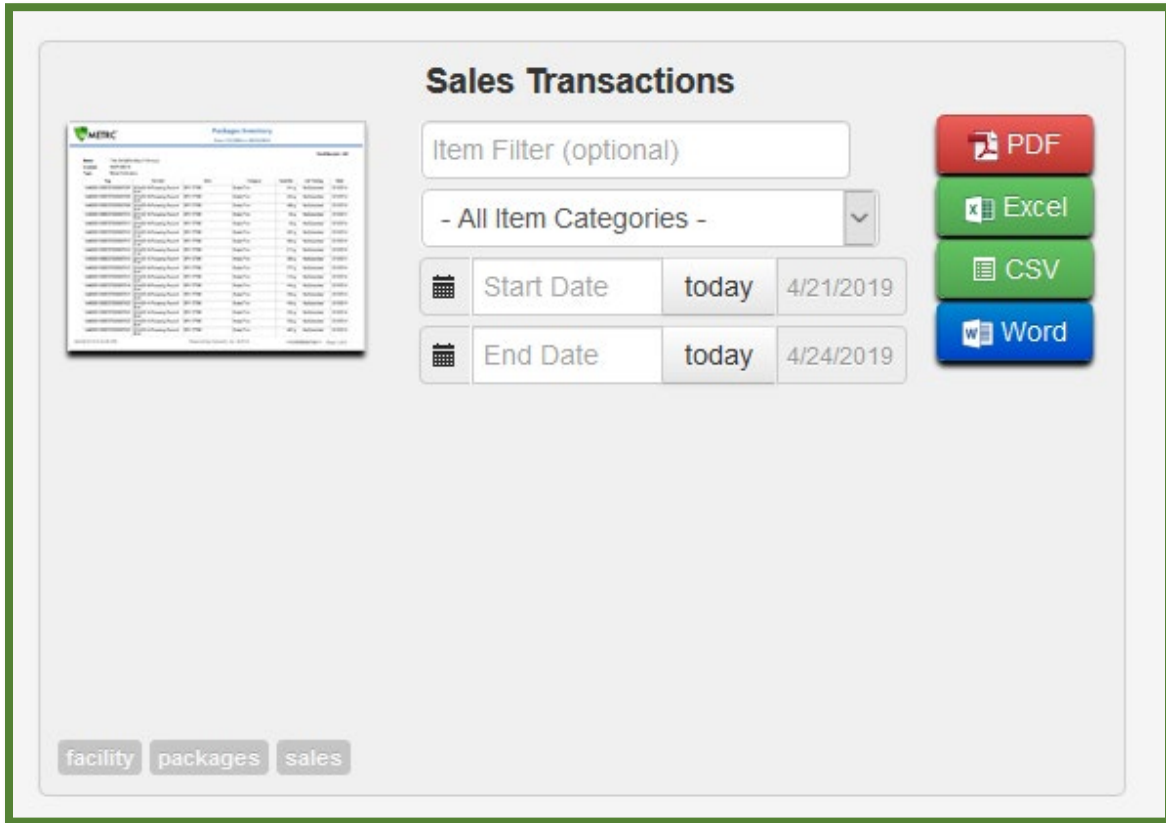
- Select -

Please select a Package.

+

(contents)

Sales Transactions Report



Sales Transactions

Item Filter (optional)

- All Item Categories -

Start Date today 4/21/2019

End Date today 4/24/2019

PDF Excel CSV Word

facility packages sales

**** Users can select all item categories or select an item from the drop-down list. The default date range is one week.**

The Sales Transactions report includes the following information: Sales Number, Date/Time, Customer, Amount, Package, Item, Category, Quantity, Price, and Item Information.



Coming Soon: CSV Row Count Restriction

Metrc processes all the records in a CSV file as a single upload transaction. Before storing any data, Metrc reviews each record to make sure there are no errors (such as a data type mismatch or the wrong number of values). If any record in the file generates an error, the upload is rejected. Metrc will report each error and the row on which it occurred. The user must then modify the CSV file and retry.

A future bulletin with an implementation date will be provided, and Metrc will then be limiting the number of rows in each CSV file upload. Exceptions will be made as appropriate.

This limitation applies only to CSV imports and does not apply to data interfaced through API.

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions or to request a copy of previous industry bulletins.