

Bulletin Number: DC_IB_0049	Distribution Date: 3/20/23	Effective Date: See Below
Contact Point: Metrc® Support	Subject: External Patient Sales Locations & Source Harvests	
Reason: Metrc is providing an update on new and upcoming functionality.		

Greetings Metrc Users,

Metrc is pleased to provide information on the new process for recording sales for external patients and the package detail tab for source harvest batch information.

When recording sales, the dispensary will use a similar drop-down for the external patient, including a pre-populated list of programs. An additional benefit of this new functionality is the addition of external patients to the patient lookup to ensure that the external patient limits are visible. The functionality for External Patient Identification Locations will be enabled on March 27th, 2023.

As for the enhancement on packages, this change was made available on December 1st, 2022, and it will provide source harvest visibility under a new tab located in the package details menu.

Please find on the following pages a detailed description of the enhancements:

Identification Method List for External Patient Receipts

Users who will be recording External Patient Sales will now have access to predetermined Identification Methods that are established by the District of Columbia. Users will no longer be able to populate the Identification Method field with custom text. An option from the dropdown list will now need to be selected to add an Identification Method for an External Patient. Please note that the Identification Method field will not be available for Patient or Caregiver Receipts. Additionally, this feature will not apply to Non-Resident Temporary Patients as they are entered treated as local D.C. Patients when entering Sales Receipts.

This functionality is applicable to all External Patient Sales and can be found when Recording or Editing Receipts for an External Patient. The Record Receipts window is shown in **Figure 4** and the Edit Receipts window is shown below in **Figure 5**.

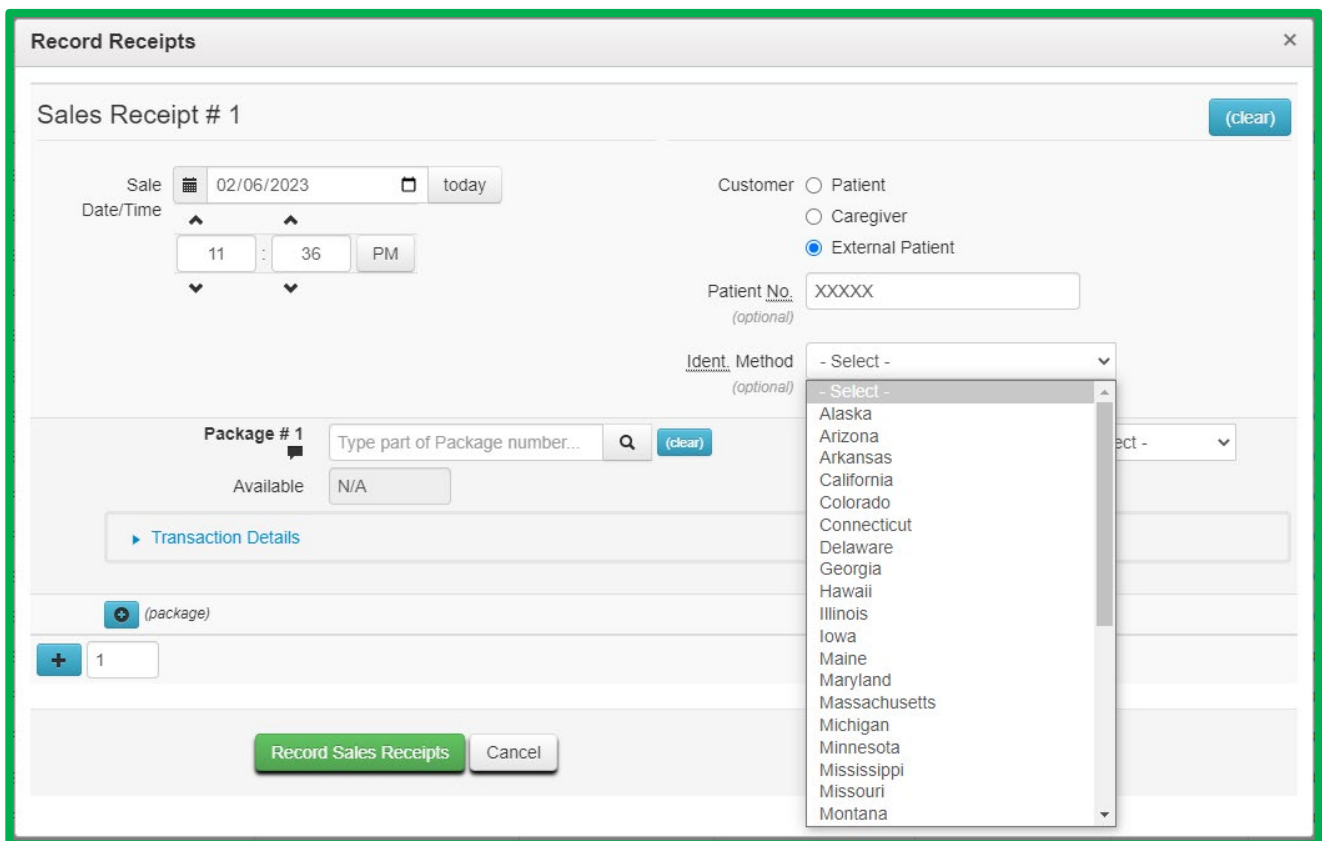
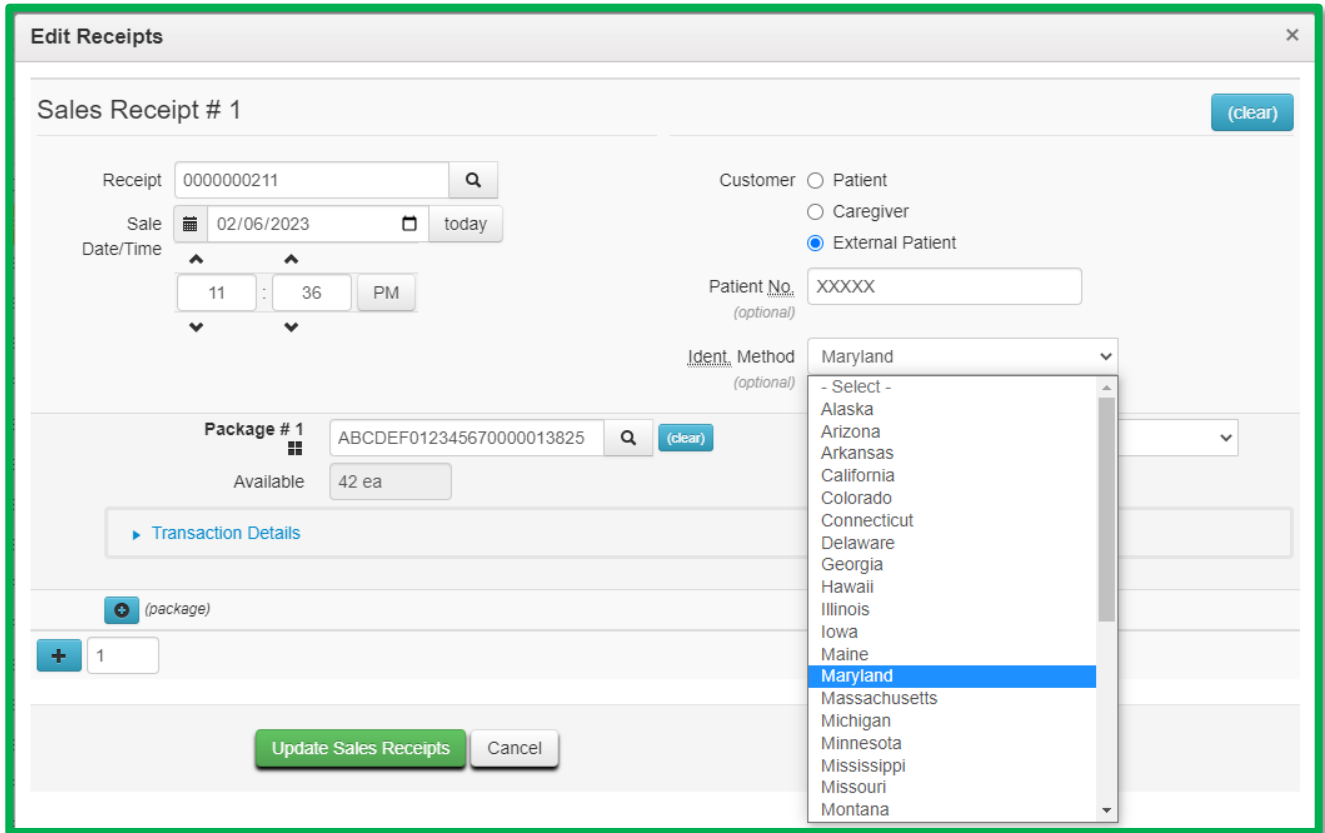


Figure 4: Record Receipts Identification Method Dropdown List



The screenshot shows a web application window titled "Edit Receipts". The main content area is titled "Sales Receipt # 1" and includes a search bar for "Receipt" with the value "0000000211". Below this is a "Sale Date/Time" section with a date picker set to "02/06/2023" and a time picker set to "11:36 PM". To the right, there are radio buttons for "Customer" type: "Patient", "Caregiver", and "External Patient" (which is selected). Below these is a "Patient No." field with the value "XXXXX". The "Ident. Method" dropdown menu is open, showing a list of states: "Maryland", "Alaska", "Arizona", "Arkansas", "California", "Colorado", "Connecticut", "Delaware", "Georgia", "Hawaii", "Illinois", "Iowa", "Maine", "Maryland" (highlighted), "Massachusetts", "Michigan", "Minnesota", "Mississippi", "Missouri", and "Montana". At the bottom of the window, there are "Update Sales Receipts" and "Cancel" buttons.

Figure 5: Edit Receipts Identification Method Dropdown List

Source Harvest Tab

Metrc has added a new tab within the packages drilldown to view information on a source harvest(s) that contributed to the creation of that package. This information includes the license name and business license number that created the harvest, harvest name, and date of the harvest. This will also allow all the harvest information for packages created from multiple harvests to be viewed.

To view this information, drill down on the package details and select the “Source Harvests” tab. This is shown in **Figure 6** below.

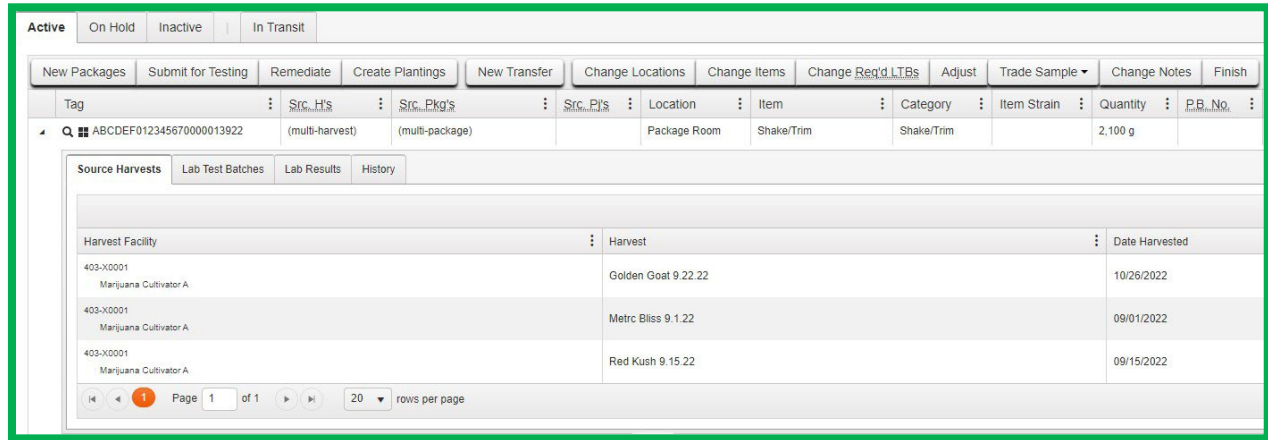


Figure 6: Source Harvest Tab

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