

Bulletin Number: DC_IB_0049	Distribution Date: 12/1/22	Effective Date: See Below
Contact Point: Metrc® Support	Subject: Patient Check-In 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. This new process for sales will require the use of the patient check-in functionality, where the dispensary will record what state the patient was issued a medical card in a dropdown.

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 Patient-Check-In Locations will be enabled on January 4th, 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:

Locations for Patient Check-Ins

Moving forward, users who will be recording Patient Check-Ins will have access to predetermined Registration Locations that are established by the District of Columbia. These locations will be selectable from a dropdown list to populate for the Check-In.

To utilize this feature, select the Check-Ins option under the Patients dropdown on the top navigational bar. This step is shown below in **Figure 1**.

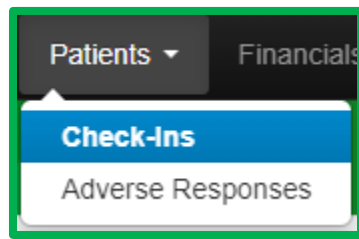


Figure 1: Navigate to Patient Check-Ins

Once on the screen, Patient details for their Check-In can be recorded within the Log Check-In window. The Log Check-In button is shown below in **Figure 2**.

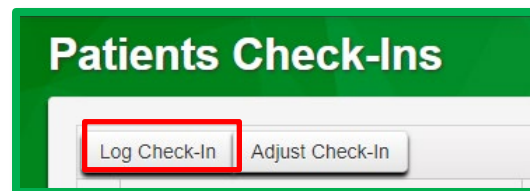
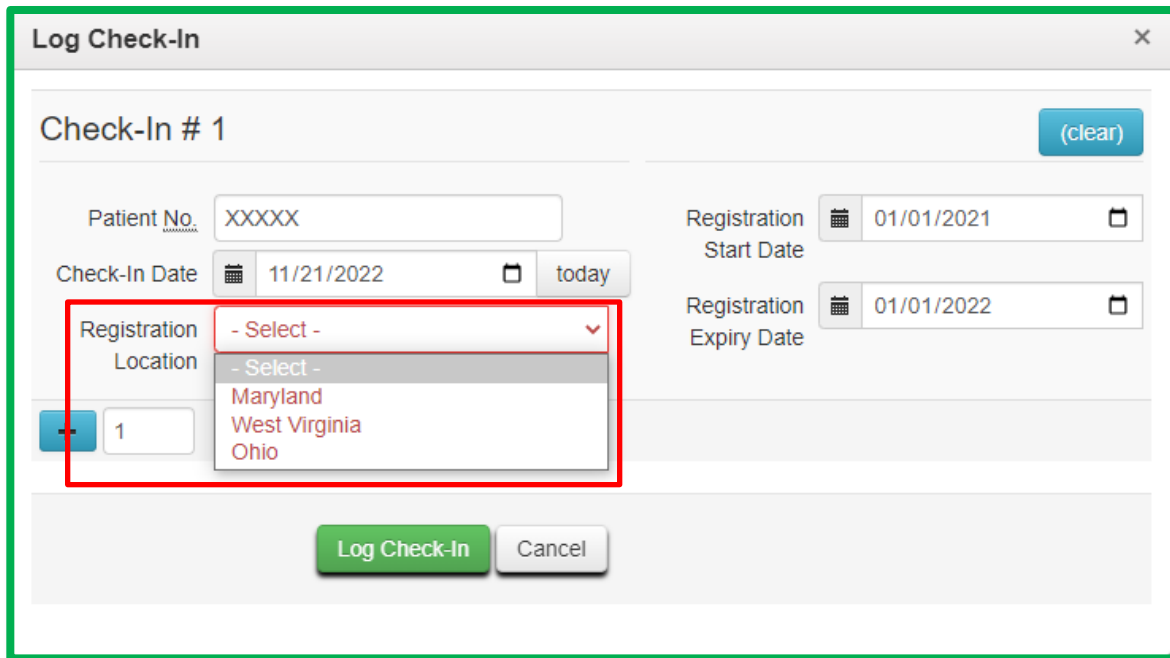


Figure 2: Navigate to Log Check-In

From the Log Check-In window, the dropdown list for Registration Locations can be located within the Log Check-In window. The appropriate Location can be selected from the dropdown list in the field to the right of Registration Locations. The Log Check-In Window with the updated Registration Location functionality is shown below in **Figure 3**.



The screenshot shows a web application window titled "Log Check-In". Inside, there's a section for "Check-In # 1" with a "(clear)" button. Below this, there are input fields for "Patient No." (containing "XXXXX"), "Check-In Date" (calendar icon, "11/21/2022", and a "today" button), "Registration Start Date" (calendar icon, "01/01/2021", and a calendar icon), and "Registration Expiry Date" (calendar icon, "01/01/2022", and a calendar icon). A dropdown menu for "Registration Location" is open, showing options: "- Select -", "Maryland", "West Virginia", and "Ohio". To the left of the dropdown is a blue button with a plus sign and a text box containing "1". At the bottom are "Log Check-In" and "Cancel" buttons.

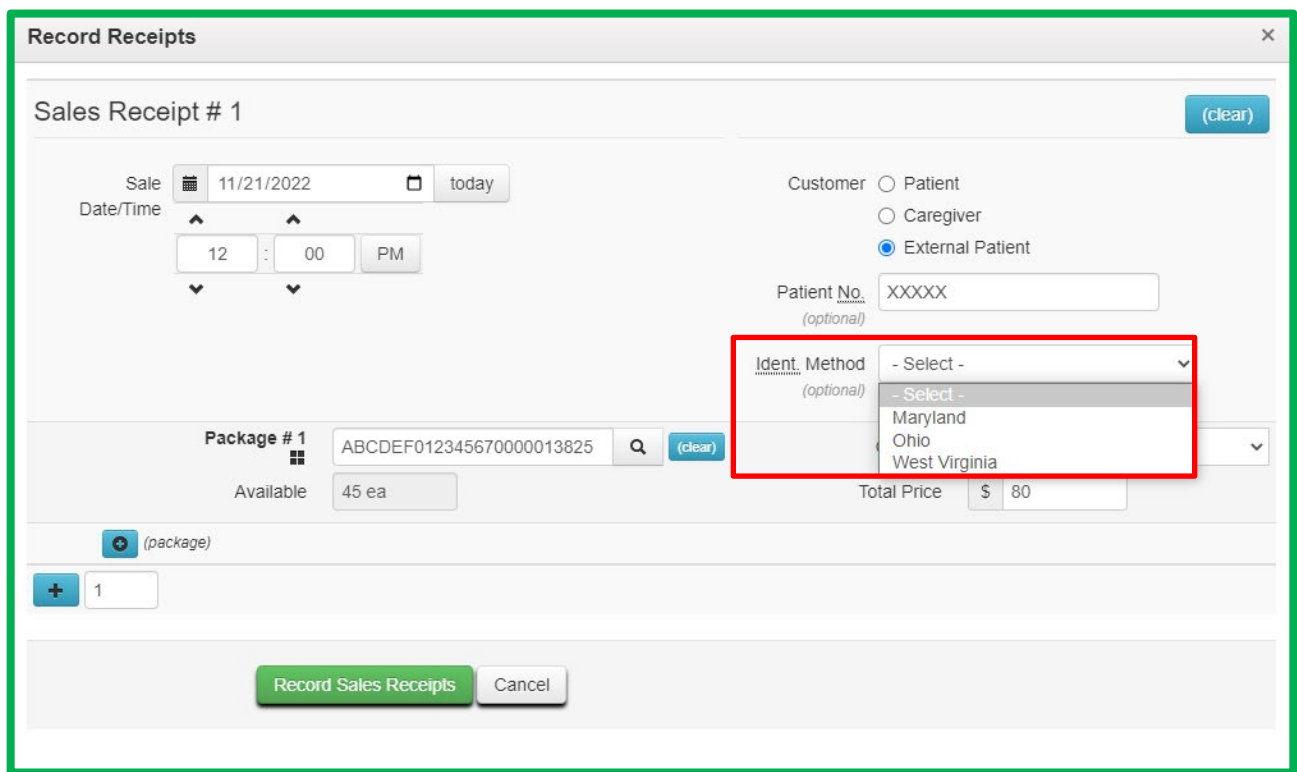
Figure 3: Log Check-In Window with Registration Locations Dropdown List

Please note: External patients checked in will now appear in the patient status lookup, providing the remaining amount on their 30-day allotment.

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.

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 below in **Figure 4** and the Edit Receipts window is shown below in **Figure 5**.



The screenshot displays the "Record Receipts" window. At the top, it shows "Sales Receipt # 1" with a "(clear)" button. Below this, the "Sale Date/Time" is set to "11/21/2022" with a "today" button and a time selector showing "12 : 00 PM". The "Customer" section has three radio buttons: "Patient", "Caregiver", and "External Patient" (which is selected). The "Patient No." field contains "XXXXX" and is marked as optional. The "Ident. Method" dropdown menu is open, showing options: "- Select -", "Maryland", "Ohio", and "West Virginia". Below the dropdown, the "Package # 1" field contains "ABCDEF012345670000013825" with a search icon and a "(clear)" button. The "Available" quantity is "45 ea". The "Total Price" is "\$ 80". At the bottom, there is a "+ 1" button and a "(package)" button. The window concludes with "Record Sales Receipts" and "Cancel" buttons.

Figure 4: Record Receipts Identification Method Dropdown List

Figure 5: Edit Receipts Identification Method Dropdown List

Source Harvest Tab

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

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

Active

On Hold

Inactive

In Transit

New Packages

Submit for Testing

Remediate

Create Plantings

New Transfer

Change Locations

Change Items

Change Reg'd LTBS

Adjust

Trade Sample

Change Notes

Finish

Tag	Src. H's	Src. Pkg's	Src. P's	Location	Item	Category	Item Strain	Quantity	P.B. No.
ABCDEF012345670000013922	(multi-harvest)	(multi-package)		Package Room	Shake/Trim	Shake/Trim		2,100 g	

Source Harvests

Lab Test Batches

Lab Results

History

Harvest Facility	Harvest	Date Harvested
403-X0001 Marijuana Cultivator A	Golden Goat 9.22.22	10/26/2022
403-X0001 Marijuana Cultivator A	Metrc Bliss 9.1.22	09/01/2022
403-X0001 Marijuana Cultivator A	Red Kush 9.15.22	09/15/2022

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rows per page

Figure 6: Source Harvest Tab

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