Metrc Support Bulletin

Bulletin Number: MO_IB_0020	**Distribution Date**: 2/2/2023	**Effective Date**:2/3/2023
Contact Point: Metrc® Support	**Subject**: Patient Check-In Locations and Consumer Sales	
Reason: Metrc is providing an update on new and upcoming functionality.		

Greetings Metrc Users,

Metrc is pleased to provide information on the new processes for recording sales for external patients and consumers. This new process for external patient sales will require the use of the patient identification method field, where the dispensary will record what state the patient was issued a medical card in a dropdown menu.

When recording sales, the dispensary will use a similar drop-down for the external patient, including a pre-populated list of state medical programs. A benefit of this new functionality is after an external patient's sale is recorded their information will be available in the patient lookup to ensure that the external patient limits are visible and recorded.

Also, there are new radial buttons available for selection to help differentiate between patients and consumers. Be sure to select the appropriate one for each sale.

Please see below for a detailed description of these enhancements:

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Validating Out-of-State Patients and Home Cultivators

Dispensary licenses will now be able to validate out-of-state patient limits and home cultivator licenses using the patient and caregiver lookup features. These are available by selecting the magnifying glass on the top navigational bar as seen below in **Figure 1**.

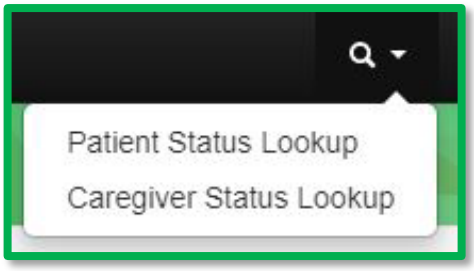

Figure 1: Patient and Caregiver Status Lookup

When making a sale to an out-of-state patient, the dispensary agent should utilize the **Patient Status Lookup** feature and enter the medical card number for the out-of-state patient. If they appear, then there will be an available amount based on the standard out-of-state patient allotment and previous purchases. If they do not appear, this is the external patient's first purchase in Missouri.

If a home cultivator is attempting to purchase seeds or clones, their home cultivator license number should be entered into the **Caregiver Status Lookup** feature to validate they have an active card.

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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 DCR. Users will not be able to populate the Identification Method field with custom text. An option from the dropdown list will 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 action window is shown in **Figure 2** and the Edit Receipts window is shown below in **Figure 3**.

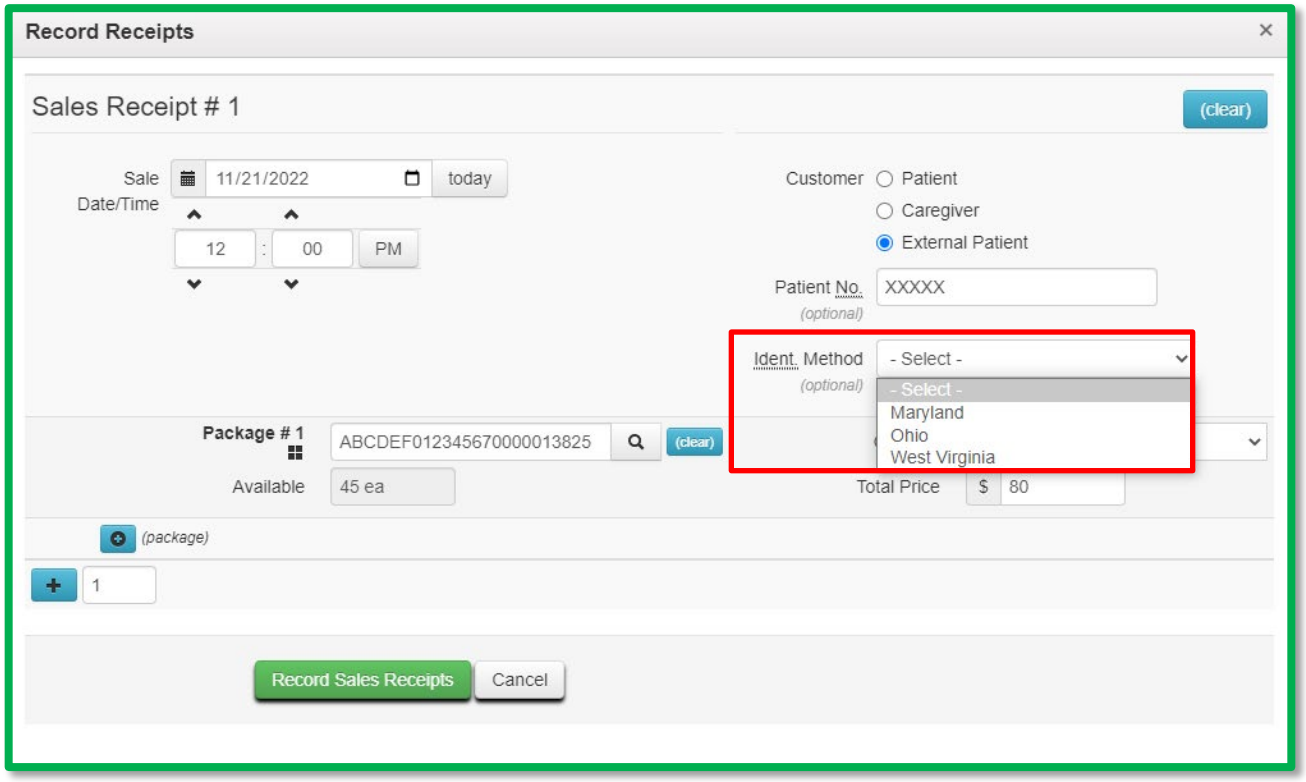

Figure 2: Record Receipts Identification Method Dropdown List

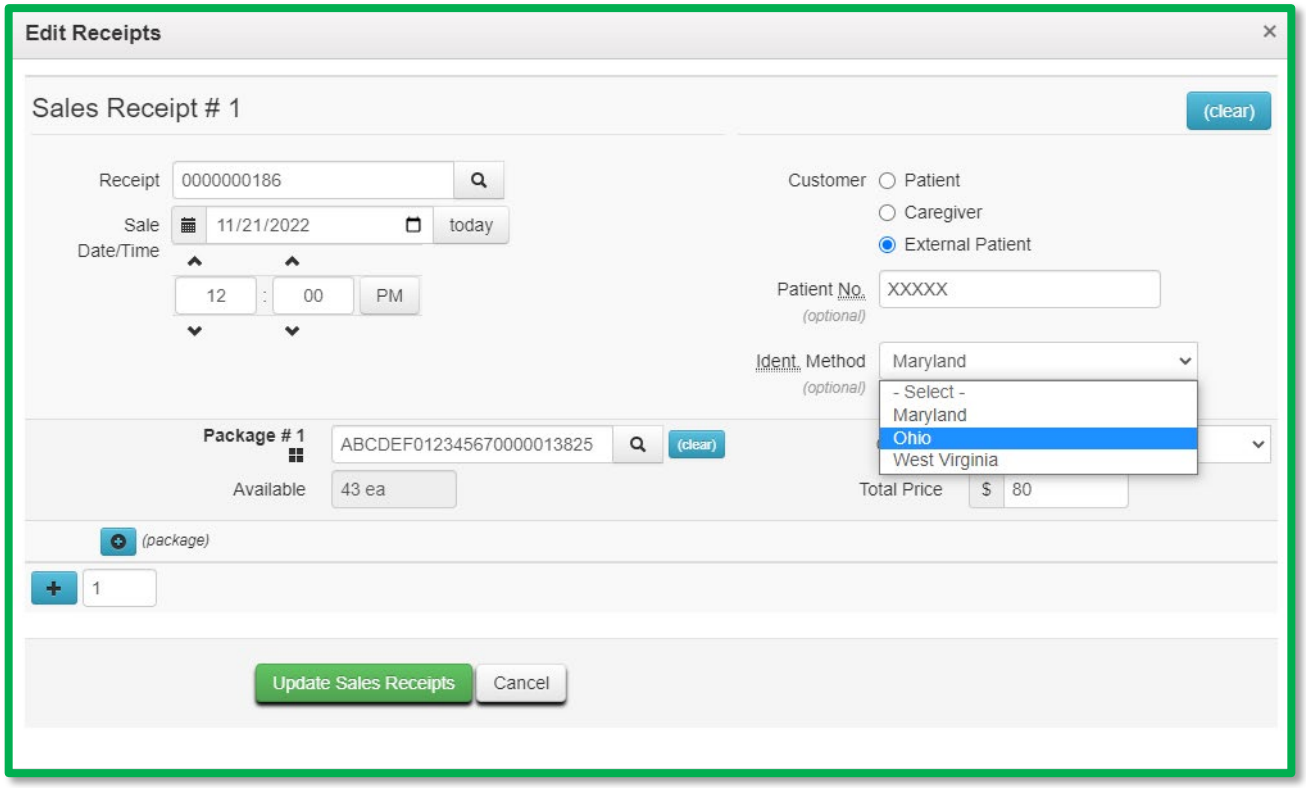

Figure 3: Edit Receipts Identification Method Dropdown List

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

Adult-Use Sales

Comprehensive license users will be able to differentiate between customer types for sales which will include “Consumer” sales. You can select from an option of radial buttons depending on the sale. If the sale is for a patient, please select the patient radial button. If a sale is for a consumer, please select the consumer radial button. Please see **Figure 4** with the new available options to select.

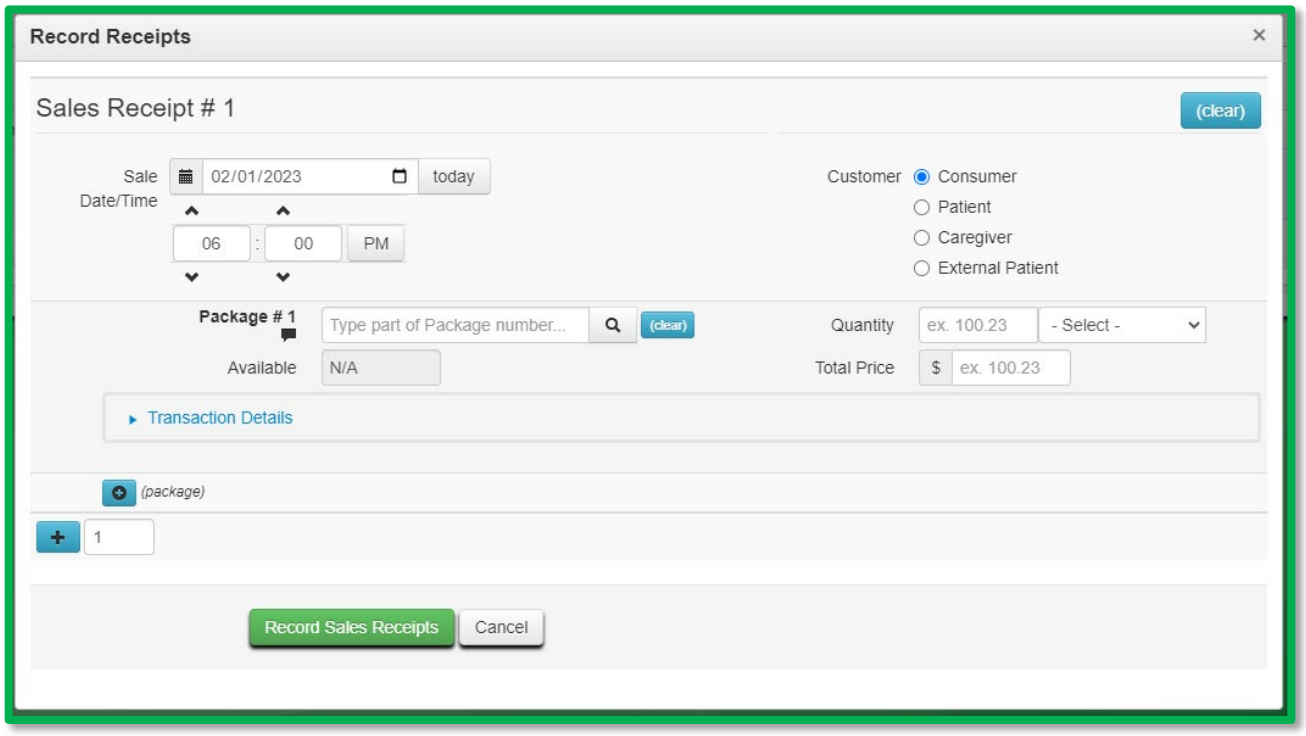

Figure 4: Consumer Sales Option

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