

<b>Bulletin Number:</b> SD_IB_0014 Purchase Limits Guidance	<b>Distribution Date:</b> 10/27/23	<b>Effective Date:</b> 10/26/23
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> Dispensing cannabis to patients & caregivers	
<b>Topic:</b> Purchase Limits Guidance, 14-day rolling limits, Patient and Caregiver validation workflows, and an overview of the dispensing process.		

Greetings,

Metrc, in collaboration with the South Dakota Department of Health, is pleased to provide clarification around how patient limits are tracked and accounted for within the Metrc system, along with guidance around the dispensing process.

This bulletin includes important information regarding:

- 14-day rolling patient limits
- Patient and Caregiver validation
- Overview of the dispensing process

Please read on for more information.

**Important notes for dispensaries:**

- If patients or caregivers attempt to buy more than the purchase limit allowed, which is 3 ounces of flower within a 14-day rolling limit period, it is the retail dispensary’s responsibility to not dispense any amount exceeding this limit to the patient or caregiver.
- It is the dispensary’s responsibility to ensure that only validated patients and caregivers are allowed into the medical cannabis dispensary.
- Point of sale systems do not dictate the amount calculated for patient limit deductions on count-based categories as this is handled in Metrc. If an item is received with the incorrect weight, this needs to be flagged and escalated to the manufacturer. Otherwise, there may be patient limit discrepancies.

### **14-day Rolling Patient Limits**

Traditional weekly or monthly limits are where limits are tied to specific weekdays or a specific calendar date. For example, on the first of every month, the limit resets to the full allotment. This approach may allow patients or caregivers to purchase the total limit on the last day of a month, then the total limit on the 1<sup>st</sup> day of the next month, which does not effectively limit patient purchases over a set amount of time.

A 14-day rolling patient limit can be more complex to understand, the below guidance is intended to aid in continued workflow efficiency as South Dakota utilizes a 14-day rolling limit that allows patients to purchase three ounces of flower within that period.

The 14-day rolling patient limit is tracked when medical cannabis is physically dispensed to a patient or caregiver. The amount purchased is subtracted from the three-ounce total. Once 14 days have elapsed, the amount purchased is added back to the three-ounce total. Each subsequent purchase will be subtracted from the patient’s allotment and added back once 14 days have elapsed from the date of the purchase. For an example of how rolling limits work, **see Figure 1** and written example below.

Date	Beginning of Day Total	Total Purchased	End of Day Total	Replenish Date
9/1	3 Ounces	0.5 Ounce	2.5 Ounces	9/15
9/3	2.5 Ounces	1 Ounce	1.5 Ounces	9/17
9/10	1.5 Ounces	1 Ounce	0.5 Ounce	9/24
9/15	1 Ounce	1 Ounce	0 Ounce	9/29

**Figure 1: 14-day Rolling Limit Example**

In the table example above, the purchase and 14-day rolling limit works as follows:

- **9/1 purchase of 0.5 ounce:** This amount is deducted from the patient’s three-ounce allotment. If no other purchases are made in 14 days, the 0.5 ounce will be added back 14 days later, or on 9/15, to bring their limit back to 3-ounces.
- **9/3 purchase of 1.0 ounce:** Since this purchase was made within the initial 14-day rolling limit, it is also deducted from the patient’s three-ounce rolling allotment (limit), bringing the new remaining available total to 1.5 ounces.
- **9/10 purchase of 1.0 ounce:** Since this purchase was made within the initial 14-day allotment and does not exceed the limit, it is deducted from the patient’s three-ounce limit, bringing the new remaining available total to 0.5 ounces.
- In this case, the patient wishes to purchase another ounce prior to 9/15, however, only 0.5 ounces remain available. This means the patient must wait until the 0.5 ounce from their first purchase on 9/1 is added back to their 14-day rolling limit on 9/15, which is why the patient was able to make the 1-ounce purchase on that date.

### Patient and Caregiver validation

Metrc and the South Dakota Department of Health is providing tools to ensure dispensaries remain compliant when allowing valid patients and caregivers to enter their facilities. It is the dispensary’s responsibility to ensure that only validated patients and caregivers are allowed into the medical cannabis dispensary.

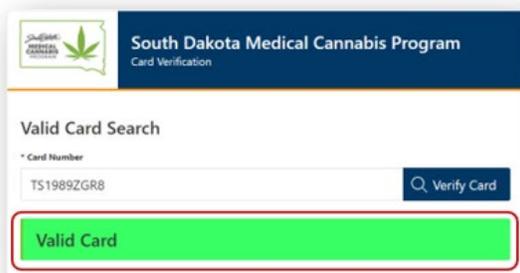
To start patient or caregiver validation, a visual check of the patient and/or caregiver ID is recommended. All patient and caregiver ID numbers must be in the following format:

- Ten (10) characters in length
- Alphanumeric (letters and numbers with no symbols)
- All letters are capitalized

Example of a patient or caregiver ID that meets the requirements above: **TS1989ZGR8**

Once ID is confirmed to match the required format, it is recommended to gain secondary confirmation using the South Dakota Medical Cannabis Program Card Verification website. To do so, navigate to <https://medcannabisverify.sd.gov/> and enter the ID number into the \*Card Number field on the Valid Card Search page and click the blue ‘Verify Card’ button. From here, two scenarios can occur:

- **Scenario 1:** If the ID is *valid*, a green Valid Card tab will appear– see **Figure 2**.
- **Scenario 2:** If the ID is *invalid*, a red Invalid Card tab will appear – see **Figure 3**.



(Left) Figure 2: Valid Patient Number Search

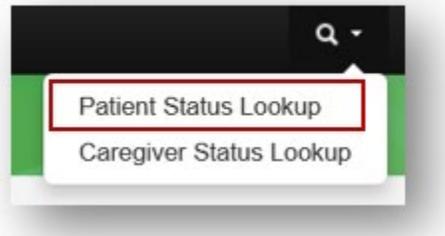


(Right) Figure 3: Invalid Patient Number Search

**Note:** While the invalid card number in Figure 3 is the same as the valid card number in Figure 2, it is invalid due to the lowercase letters.

The last step to validating a patient and/or caregiver ID is to verify the card in Metrc using the Patient and/or Caregiver Status Lookup feature. For example, to look up a Patient ID:

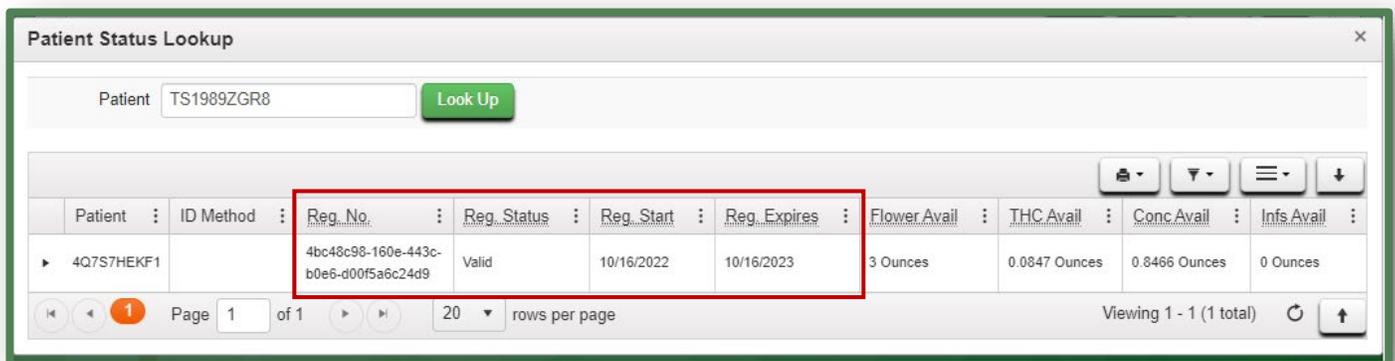
- Click the magnifying glass symbol on the right side of the navigational toolbar.
- From the dropdown, select 'Patient Status Lookup' – see **Figure 4**.



**Figure 4: Patient & Caregiver Status Lookup dropdown**

The Patient Status Lookup action window will appear. Then follow the below steps:

- Enter the ID number in the Patient field and click the green 'Look Up' button.
  - A Valid ID will have a Reg. No., Reg. Status, Reg. Start, and Reg. Expires – see **Figure 5**.
  - The Flower Avail column will be populated.

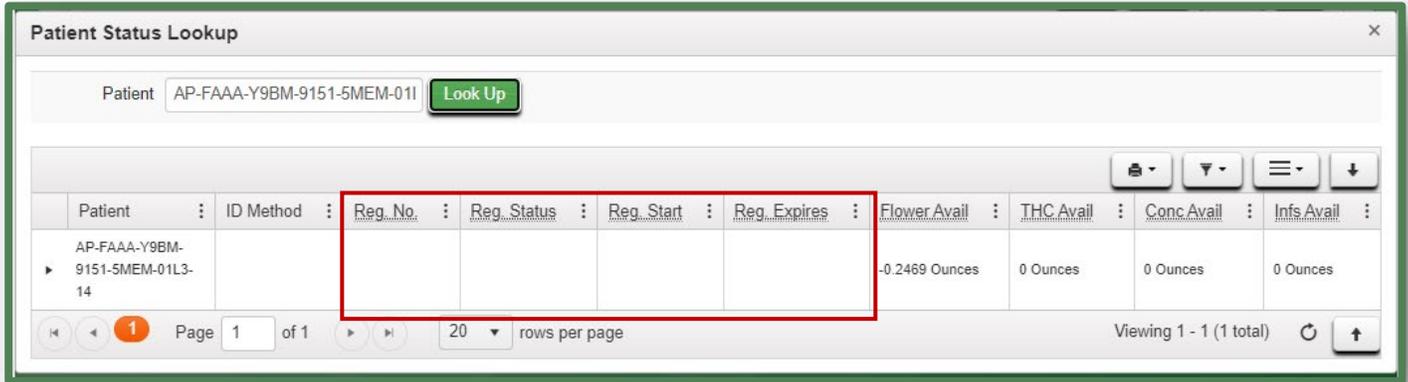


**Figure 5: Valid Patient ID in the Patient Status Lookup**

Two common mistakes when entering the patient ID number include:

- Using lowercase letters
- Entering the patient's registration number instead of their patient ID number

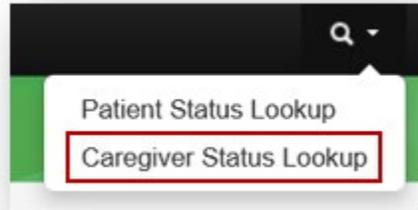
An Invalid ID will not show a Reg. No., Reg. Status, Reg. Start and Reg. Expires – see **Figure 6**.



**Figure 6: Invalid Patient ID in the Patient Status Lookup**

To look up a Caregiver ID:

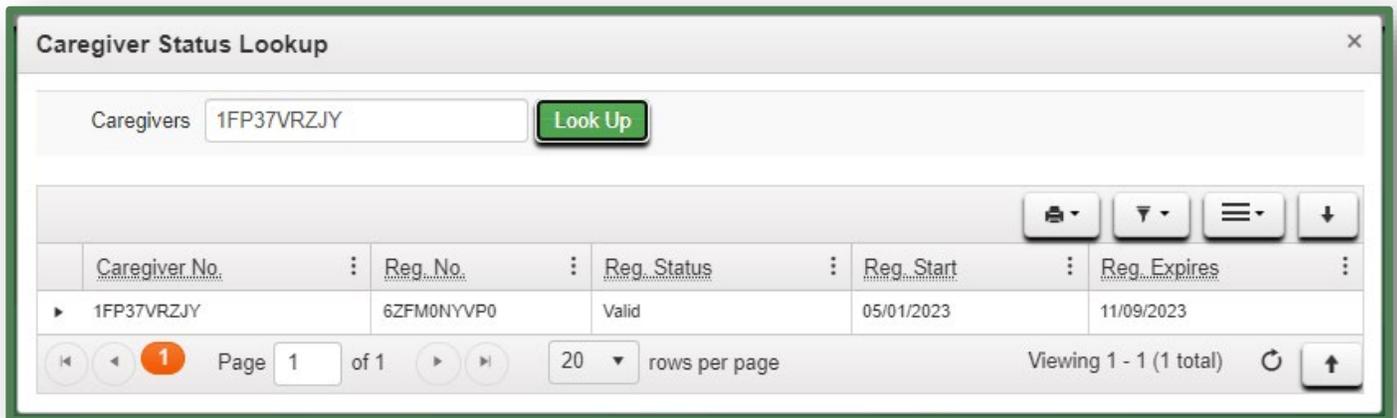
- Click the magnifying glass symbol on the right side of the navigational toolbar.
- From the dropdown, select 'Caregiver Status Lookup' – see **Figure 7**.



**Figure 7: Patient & Caregiver Status Lookup dropdown**

The Caregiver Status Lookup action window will appear. Then follow the below steps:

- Enter the ID number in the Caregivers field and click the green 'Look Up' button.
  - A Valid ID will have a Reg. No., Reg. Status, Reg. Start, and Reg. Expires – see **Figure 8**.



**Figure 8: View of the Caregiver Status Lookup with a valid Caregiver ID**

**Please note:** The Flower Avail column will not populate from the Caregiver Status Lookup action window as this can only be accessed and validated through the Patient Status Lookup action window.

## **Overview of the Dispensing Process**

The dispensing of medical cannabis is simple and efficient once the 14-day rolling patient limit and validation process is understood. To better understand the dispensing process, the following provides guidance of this process – from start to finish.

### **At check-in**

- The Patient ID and Caregiver ID need to be validated in both the SD Medical Cannabis Program Card Verification Portal and Metrc.
  - If the card is invalid, first ensure that the number is entered accurately.
    - No lowercase letters
    - Double-check for errors (e.g., entering the letter ‘O’ instead of the number ‘0’)
    - The patient or caregiver number is entered, not the registration number
  - Within Metrc, ensure the Reg. No. and Reg. Status is valid
    - It is recommended that the purchase limits are verified at check-in and the patient is informed of their current limit status.
    - If the amount of ‘Flower Available’ is in the negative, inform the patient that they have reached their purchase limit and when their purchase limits will be replenished.
  - If selling to a Caregiver, both their ID and the Patient they are purchasing for should be validated, and cannabis dispensed to a Caregiver should be tracked against the proper patient’s ID.

### **At point of purchase**

- The budtender must also verify the Patient ID or Caregiver ID within Metrc.
  - Budtender must confirm the patient has enough remaining in their purchase limits to sell what is being requested.
  - If selling to a Caregiver, the budtender needs to ensure that the patient they are purchasing for is affiliated with their Caregiver ID.
  - Budtender completes the dispensing process, ensuring that the patient and/or caregiver IDs are entered accurately, and the patient is not purchasing over their limit.

## **Metrc Resources**

If you have any questions, or need additional support, please leverage the following:

### **Metrc Support:**

Email [Support@metrc.com](mailto:Support@metrc.com), call 877-566-6506, or log into our [Support Portal](#) and navigate to 'Contact Us' to log a ticket or live chat a Support team member.

### **Metrc Learn training:**

Metrc Learn is designed to offer educational opportunities to enhance users' skills with the Metrc system and provides various training options based on experience level. In addition, the learning system is organized into facility-specific programs made up of various courses. To login, visit [Metrc Learn](#) and enter your login credentials, or to access, register by visiting the [Metrc Learn Registration](#).

### **Additional resources:**

In the Metrc system, click on the "Support" dropdown in the top-right navigational toolbar and select the appropriate resource, including educational guides and more.

Thank you for your continued partnership.