

Bulletin Number: OH_IB_0051	Distribution Date: 02/19/2024	Effective Date: 03/04/2024
Contact Point: Metrc Support	Subject(s): Patient ID Guidance, Adjust Immature Plant Batch Counts and User Grid Refresh	
Reason: To provide industry users guidance and awareness about Metrc updates		

Greetings,

Metrc is pleased to provide information on the latest Patient ID updates that will be available on 03/04/2024, which includes:

- Please note that beginning on March 4, 2024, Metrc will start returning an error that the patient is invalid if the outlined format is not submitted via the API or UI for the Ohio Metrc system
- Also beginning on March 4, 2024, Metrc users are able to adjust their count of immature plant batches within a one-week time frame (168 hours)

Additionally, best practice guidance for the User Grid Refresh is included. Please read on for more information.

Patient ID Updates

Metrc and the Ohio Medical Marijuana Control Program (MMCP) are 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:

- **Twenty (20) numbers in the following format**
- **0000-0000-0000-0000-0000**
- **No letters, symbols are included**

Please note that beginning on March 4, 2024, Metrc will start returning an error that the patient is invalid if the outlined format is not submitted via the API or UI for the Ohio Metrc system. While there are updates that include an error message when providing an invalid Patient ID, the required Patient ID format has not changed.

Example of what an invalid entry will look like in Metrc:

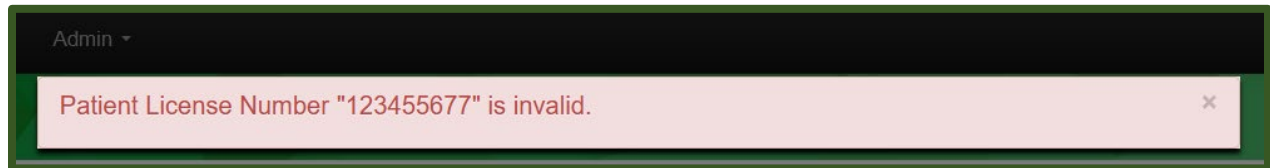


Figure 1: Invalid Patient ID Number Notice

Example of a patient or caregiver ID that meets the Patient ID requirements:

- 1234-5678-9012-3456-7890

To validate a patient and/or caregiver ID is to verify the card in Metrc using the Patient and/or Caregiver Status Lookup feature. This functionality will help the dispensaries ensure product is not over dispensed at one or multiple locations.

Two common mistakes when entering the patient ID number include:

- Transposing letters or inputting a "0" (number) instead of "O" (letter)
- Entering the patient's registration number instead of their patient ID number

Adjust Immature Plant Batch Feature

It is important that all immature plant batch counts are accurately accounted for in Metrc. In the case a mistake is made that causes inaccurate entry of immature plant batch count information, Metrc system functionality allows for corrective action adjustments to be made within one week of a plant batch being created, per MMCP regulations.

If a data entry error is caught in time, the following steps should be followed to adjust the immature plant batch count to correct the error – **see Figure 2.**

- Start in the Plants section of Metrc and click on the Immature tab.
- Select the immature plant batch row that requires adjustment.
- Click on the Adjust button to open the Adjust Plant Batches action window.

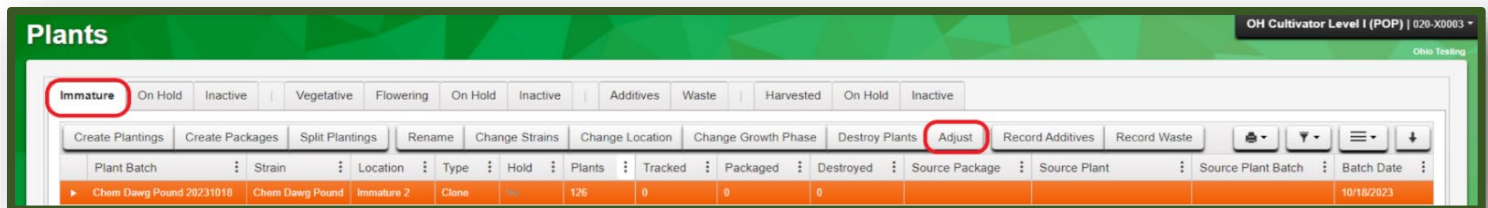


Figure 2: Plants Grid with the new Adjust Button

The Adjust Plant Batches action window includes the same fields as the Adjust Package action window – Group, Quantity, Adjustment Quantity, New Quantity, Adjustment Reason, Optional Note, and Adjustment Date.

An Adjustment Reason is required whenever an immature plant batch is adjusted. Also, the most accurate description from the Reason dropdown should be chosen. If none of the predetermined options are a fit, it is recommended to select the most accurate and provide more information in the Note field – **see Figure 3.**

Adjust Plant Batches

Plant Batch # 1 (clear)

Group Chem Dawg Pound 20231018 Q

Quantity 126

Adj. Quantity -5

New Quantity 121

Removing - new total will be 121 plants

Reason Immature Plant Batch Adjustment ▼

Optional Note

Adj. Date 10/18/2023 today

+ 1

Adjust Plant Batches Cancel

Figure 3: Adjust Plant Batches Action Window

Important notes:

- It is important to regularly review the Immature Plant Grid to confirm no corrective actions, or adjustments, are needed.
- If an adjustment is needed past the one week time frame, please reach out to Metrc Support for assistance.

CSV for Immature Plant Batch Adjustments

If multiple immature plant batches need to be adjusted at one time, CSV import options are available to provide a way to increase workflow efficiency in Metrc.

Now, two data imports options will be available in the navigational toolbar. The icon in orange on the left opens the original upload page that only allows for one upload at a time. The icon in blue on the right opens the improved Updated Data Import page, which is encouraged as a best practice to use to access the new functionality described below – **see Figure 4.**

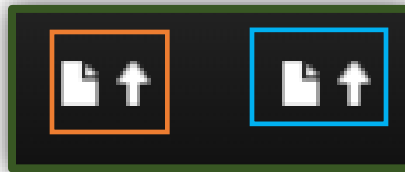


Figure 4: Legacy Data Import Icon

To upload CSV files through the legacy system, navigate to the legacy Data Import page and click the Data Import button on the left (see **Figure 4** above) to access the legacy CSV file option.

Once the button is clicked, the Data Import page will open. Navigate to and select the Plant Batch Adj. tab, and then click the Select files button. Find the relevant file and select it for upload – **see Figure 5.**

Figure 5: CSV Uploads Through the Legacy System

Updated CSV Queue import:

New functionality through CSV Queue provides additional efficiencies in the data import process including:

- Eliminating the 500-row maximum.
- Uploads up to 1MB in file size.
- Simultaneous uploads to different files.
- Independent monitoring in the UI.
- Email notifications for errors.

To upload CSV files through the new queue system, navigate to the legacy Data Import page and click the Data Import Queue button on the right to access the new CSV file option – **see Figure 6.**

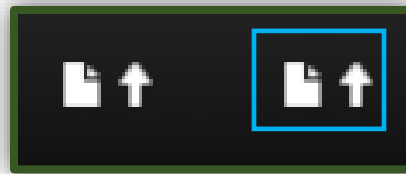


Figure 6: Data Import Queue Icon

The Updated Data Import page is designed to provide a more efficient experience and allow for status tracking on import requests using the three tabs located at the top of the grid. To initiate the CSV upload, start on the Pending tab and click the Upload CSV button – **see Figure 7.**

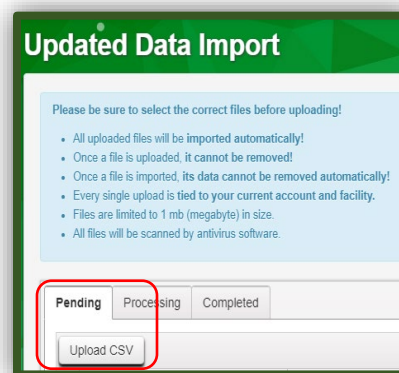


Figure 7: Upload CSV in the Pending Tab

After selecting the Upload CSV button, the Upload CSV action window will appear. First, select the applicable File Upload Type from the drop-down list. Once a File Upload Type has been selected, information clarifying what CSV columns are required and an example of the file type will be shown – **see Figure 8**.

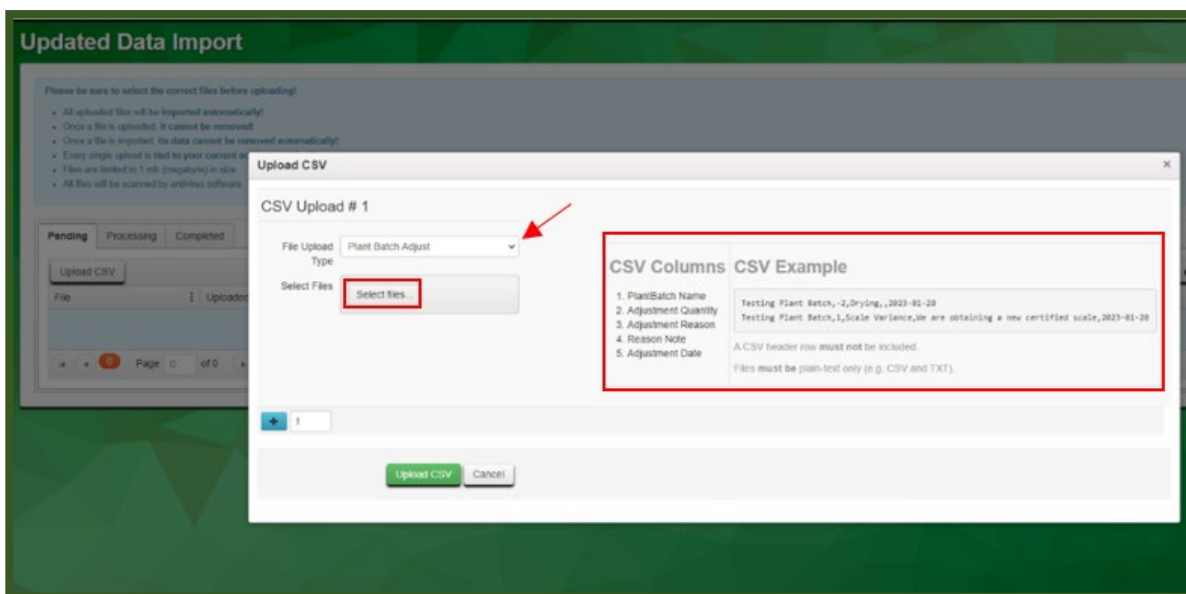


Figure 8: CSV upload through the Queue system

Then, either use the Select files button to browse the device to choose the CSV file to be imported or drag and drop a CSV file into the Select Files area of the action window. Once the CSV file is successfully recognized, the file name will appear in green letters. To initiate the final upload, click the green Upload CSV button – **see Figure 9** below.

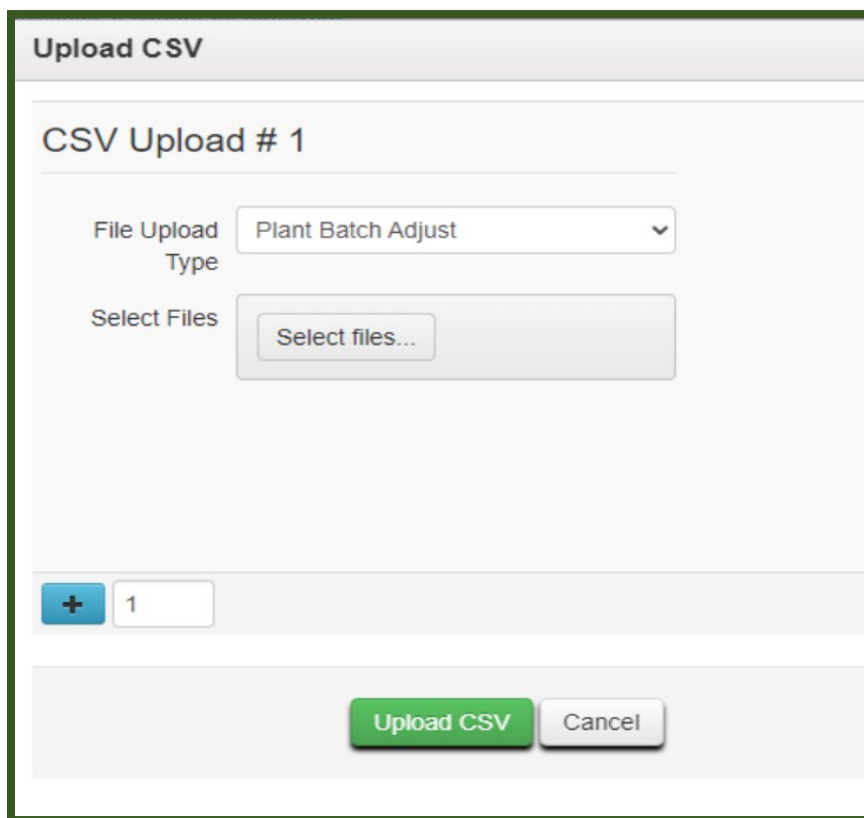


Figure 9: Upload CSV File Acceptance

Note: Visibility into the CSV upload status will be available throughout the process. The upload will start on the Pending tab, then move to the Processing tab, and finish on the Completed tab. Details about each tab are provided in Ohio Bulletin 48.

[OH IB 48-CSV-Upload-Queueing-Functionality.pdf \(metrc.com\)](#)

Grid Refresh

At times, actions may not be immediately reflected in Metrc. When this occurs, and before repeating the action, which may cause data entry errors, the Grid Refresh functionality should be used. Grid Refresh functionality is available in all Metrc tabs.

To use this functionality, navigate to the bottom right side of the table and click on the Grid Refresh button – **see Figure 10**. This will refresh all user actions at the time of its selection.

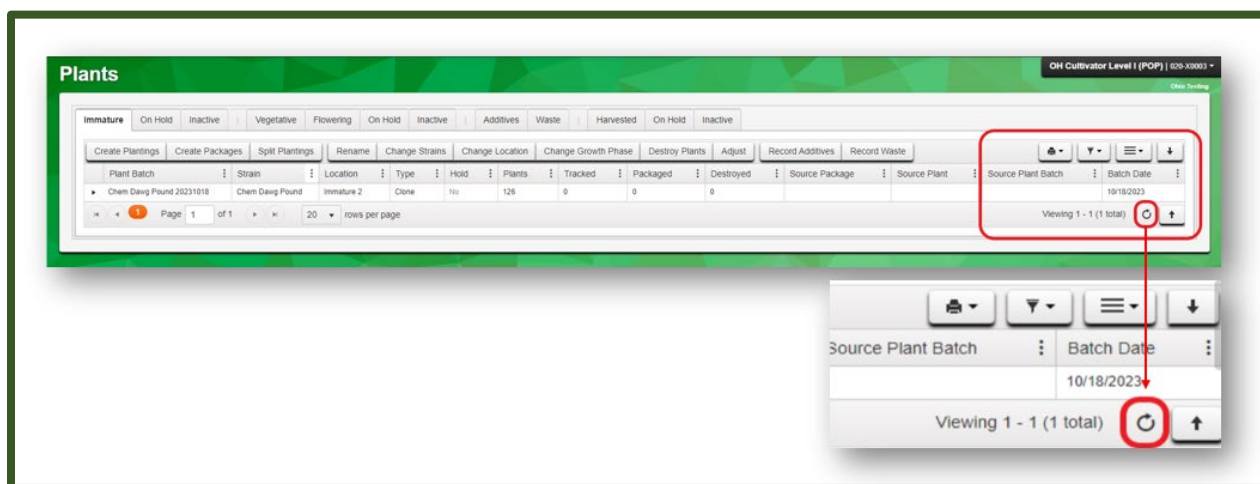


Figure 10: Grid Refresh button

Metrc Resources

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

Metrc Support:

Email 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" area dropdown on the navigational toolbar and select the appropriate resource, including educational guides and more.

Thank you for your continued partnership.