

<b>Bulletin Number:</b> NV_IB_0083	<b>Distribution Date:</b> - 06/19/2024	<b>Effective Date:</b> 08/01/2024
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> New payment functionality	
<b>Reason:</b> Metrc is releasing new functionality to improve the payment experience of monthly fees, ensure all licensed businesses remain current on payments due, and additionally, remain compliant with license requirements.		

Greetings,

Metrc values our relationship, takes pride in supporting the success of licensed business operations, and recognizes that to remain compliant with all license requirements, it is important that access to financial documentation, account status information, and easier payment options be more readily available.

Based on valuable feedback from licensees across the markets we serve, Metrc is excited to announce the launch of new system enhancements related to account financials and billing functionality.

The following Metrc system functionality will be available to licensees in the state of Nevada on 8/1/2024:

- Financial permissions
- Real-time account status
- Invoice availability in the Invoice grid

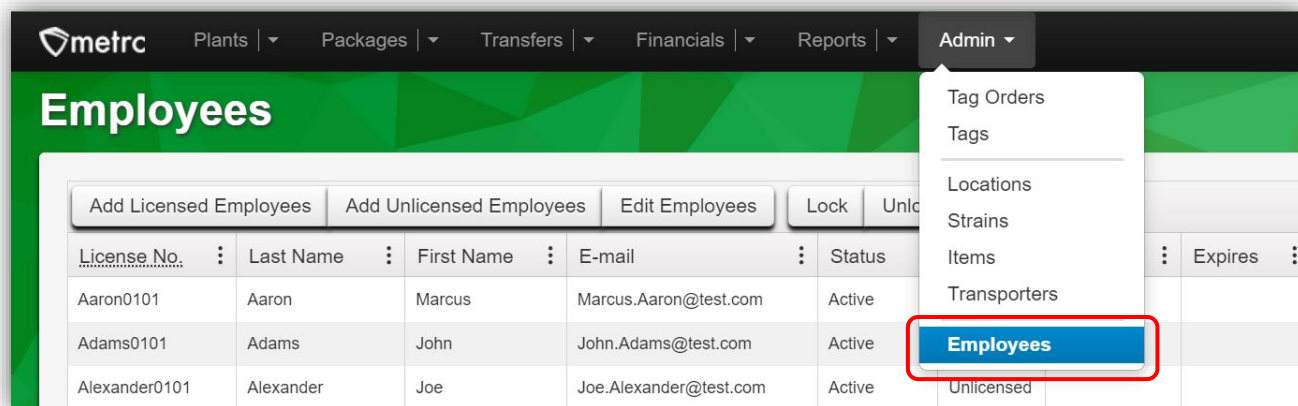
The first billing cycle reflecting changes will be scheduled for August 1<sup>st</sup>, 2024.

Additionally, Metrc is providing clarification around existing functionality that improves the payment experience of monthly fees, ensures all licensed businesses remain current on payments due, and additionally, remains compliant with license requirements.

Please read on for more information regarding this new functionality.

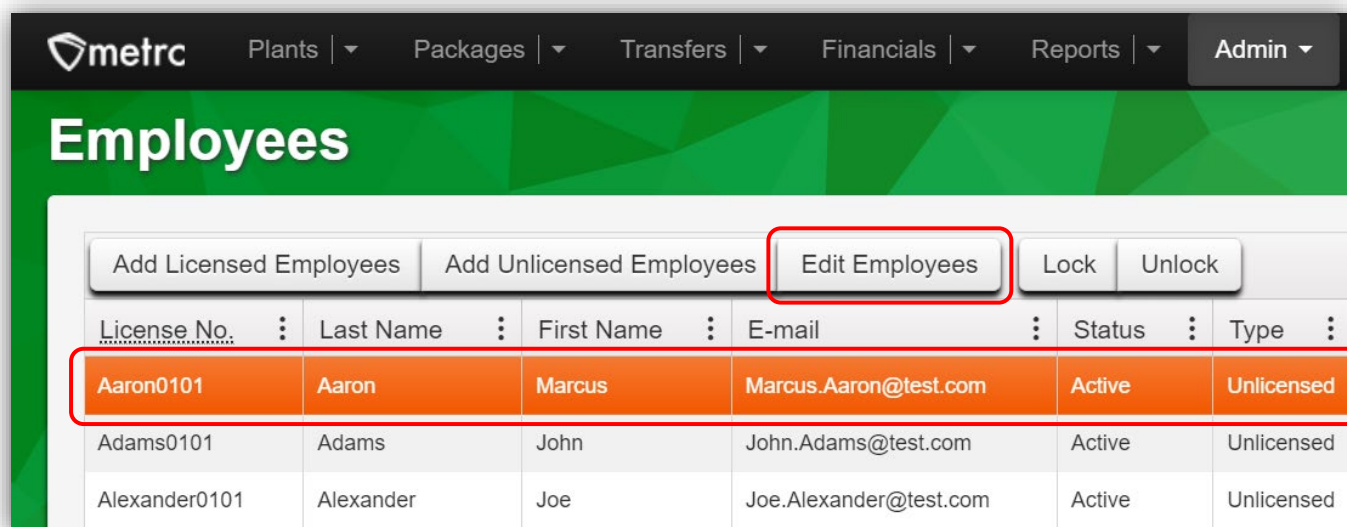
## Financial permissions

Historically, upon credentialing a new license in the Metrc system, the first Admin added to the account defaults as the financial point of contact. While this default setting will not change, the Admin will now have the ability to designate additional financial points of contact, or backup administrators with financial permissions, for payment purposes. To designate one or more additional financial points of contact, navigate to the Admin area drop-down on the navigational toolbar and select the Employees option to access the Employees Grid – **see Figure 1.**



**Figure 1: Employees grid**

Once on the Employees grid, highlight the employee to be edited, then select the Edit Employees button – **see Figure 2.**



**Figure 2: Edit Employees button**

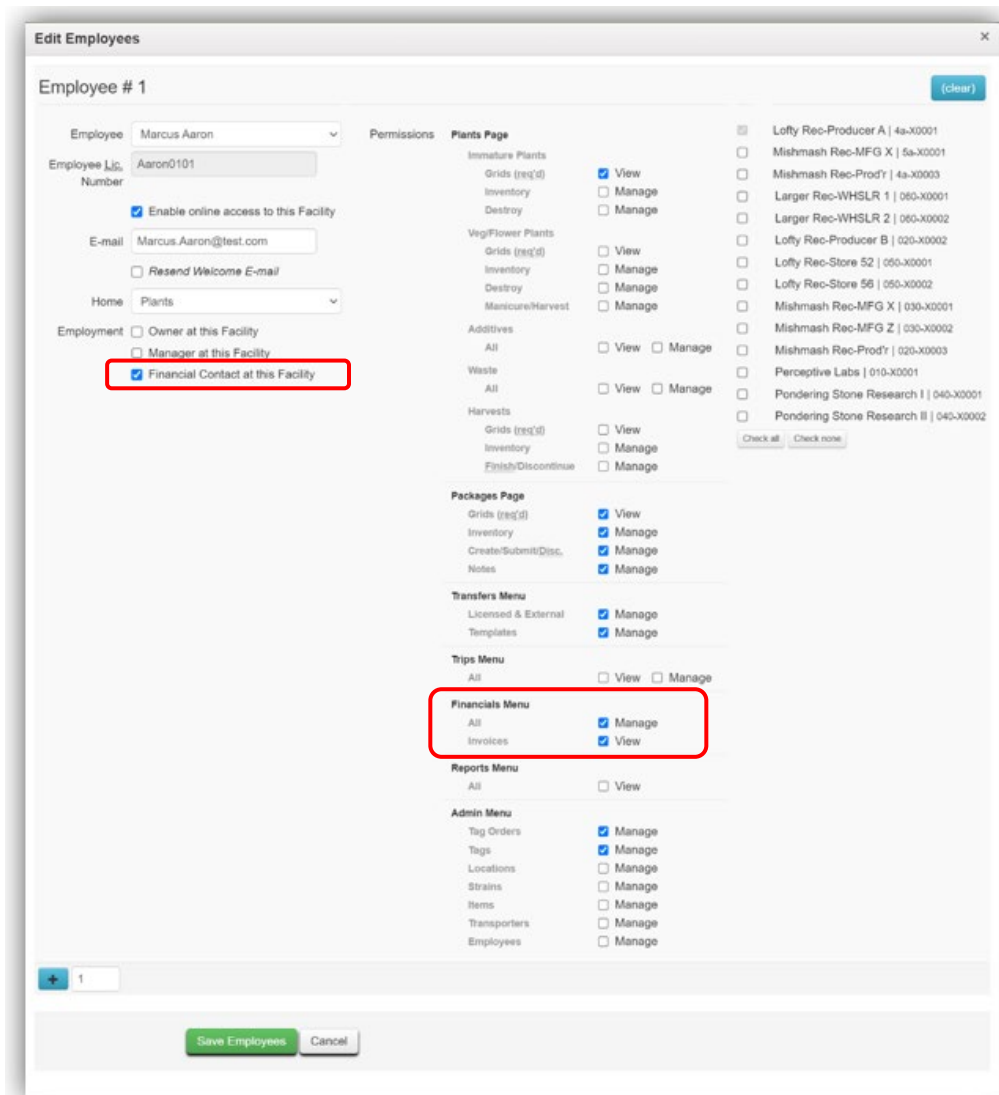
In the Edit Employees action window, there are three areas that determine the level of access an employee can have to financial information – **see Figure 3**.

**Financial contact at this facility:** Selecting this checkbox designates the employee as a financial point of contact at the licensee’s facility.

**Financials Menu > All – Manage:** Selecting this checkbox allows the employee to access all three areas of Financials: Credit Cards, Financial Summary, and Invoices.

**Financials Menu > Invoices – View:** Selecting this checkbox allows the employee to view the Invoices grid only.

Follow the same steps above to designate permissions for each individual employee.

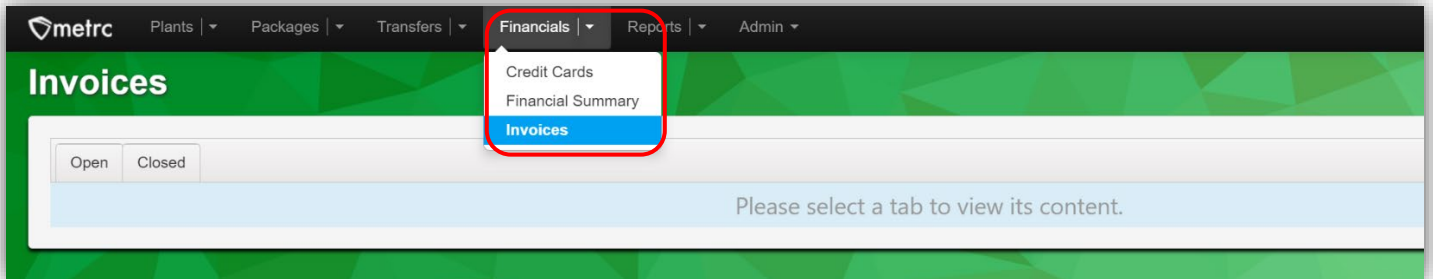


**Figure 3: Edit Employees action window and financial permissions**

## Invoices grid

Once this new functionality is released, monthly invoices for standard reporting fees will be accessible in the Metrc system, including open and closed invoices, which can be viewed and/or managed by employees with appropriate financial permissions through the Invoices grid.

To access the Invoices grid, click on the Financials area dropdown on the navigational toolbar and select the Invoices option – see Figure 4.

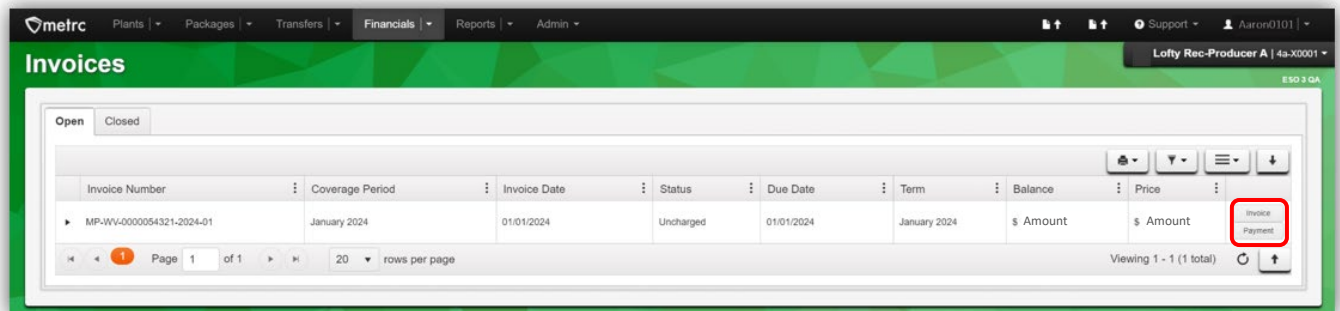


**Figure 4: Navigating to the Invoices grid**

Once on the Invoices grid, to view open invoices with unpaid balances, select the Open tab. In Open Invoices, the Invoice Number, Coverage Period, Invoice Date, Status, Due Date, Term, Balance, Price will be visible, along with Invoice and Payment action buttons – see Figure 5.

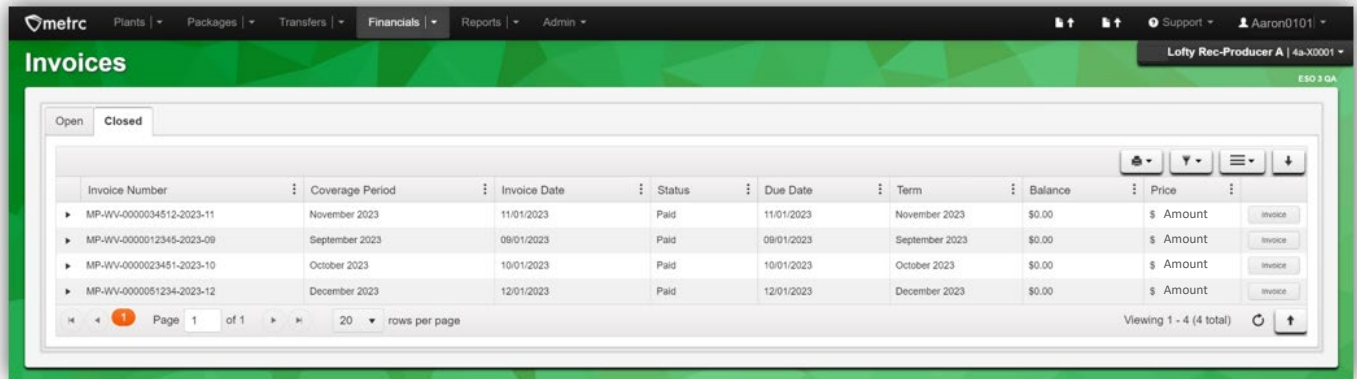
When the Payment action button is selected, the Credit Card action window will appear.

*For more information, review the ‘Payment options reminder’ section of this bulletin.*



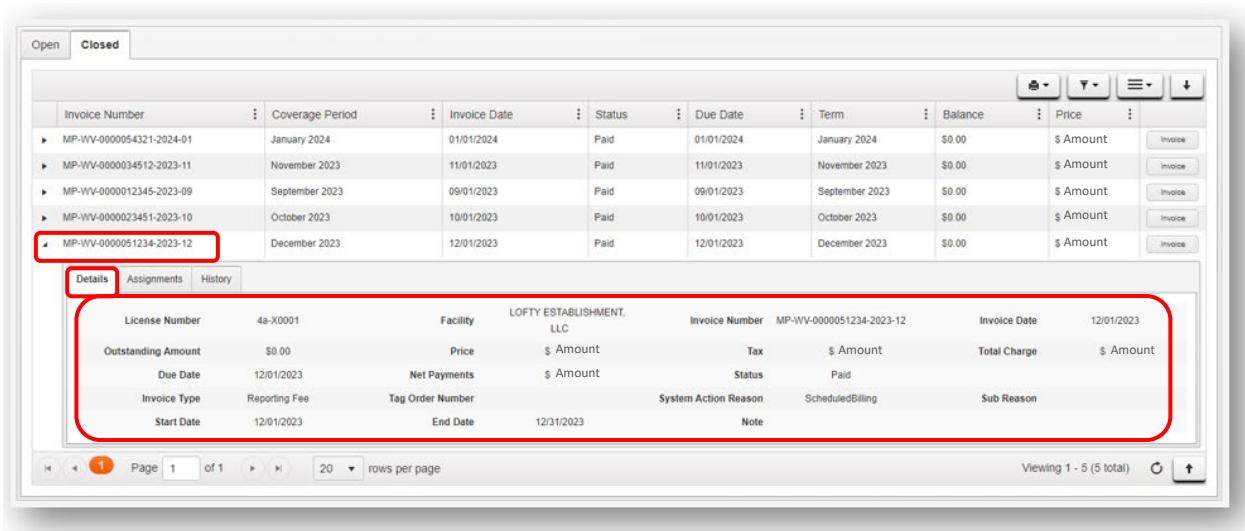
**Figure 5: Open Invoices grid**

To view closed invoices with fully paid balances, select the Closed tab. While the Closed Invoices grid will look like the Open Invoices grid, the only difference will be the absence of the Payment button and the list of paid invoices will be visible – see **Figure 6**.



**Figure 6: Closed Invoices grid**

To view paid invoice details from the Closed Invoices grid, click the dropdown arrow in the proper Invoice Number row to expand paid invoice details – see **Figure 7**.



**Figure 7: View closed invoice Details**

In addition to invoice details, additional information can be found by selecting the Assignments and History tabs – see **Figures 8 and 9** below.

Payment No.	Net Applied	Tx Date	Type	Payment Type	Payment Amount	Status	Description	Available Funds
85q64tb	\$	01/24/2024 01:15 pm	ReportingFee	Credit Card	N/A	Partially Applied	Charge for Outstanding Invoices	\$ Amount

Figure 8: View closed invoice Assignments

Payment No.	Applied	Date	Reason	SubReason	Note	Type	Payment Type	Payment Amount
85q64tb	\$ Amount	01/24/2024	Reporting Fee			ReportingFee	Credit Card	N/A
85q64tb	(\$ Amount)	01/24/2024	Billing Error	Rate Error		ReportingFee	Credit Card	N/A
85q64tb	\$ Amount	01/24/2024	PaymentAssigned			ReportingFee	Credit Card	N/A

Figure 9: View closed invoice History

To view, download, and/or print a closed (paid) invoice, click on the Invoice button for the proper Invoice Number row in the far right – see Figure 10.

Invoice Number	Coverage Period	Invoice Date	Status	Due Date	Term	Balance	Price	Invoice
MP-WV-000034512-2023-11	November 2023	11/01/2023	Paid	11/01/2023	November 2023	\$0.00	\$ Amount	Invoice
MP-WV-000012345-2023-09	September 2023	09/01/2023	Paid	09/01/2023	September 2023	\$0.00	\$ Amount	Invoice
MP-WV-000023451-2023-10	October 2023	10/01/2023	Paid	10/01/2023	October 2023	\$0.00	\$ Amount	Invoice
MP-WV-000051234-2023-12	December 2023	12/01/2023	Paid	12/01/2023	December 2023	\$0.00	\$ Amount	Invoice

Figure 10: Access closed (paid) invoice to view, download, and/or print

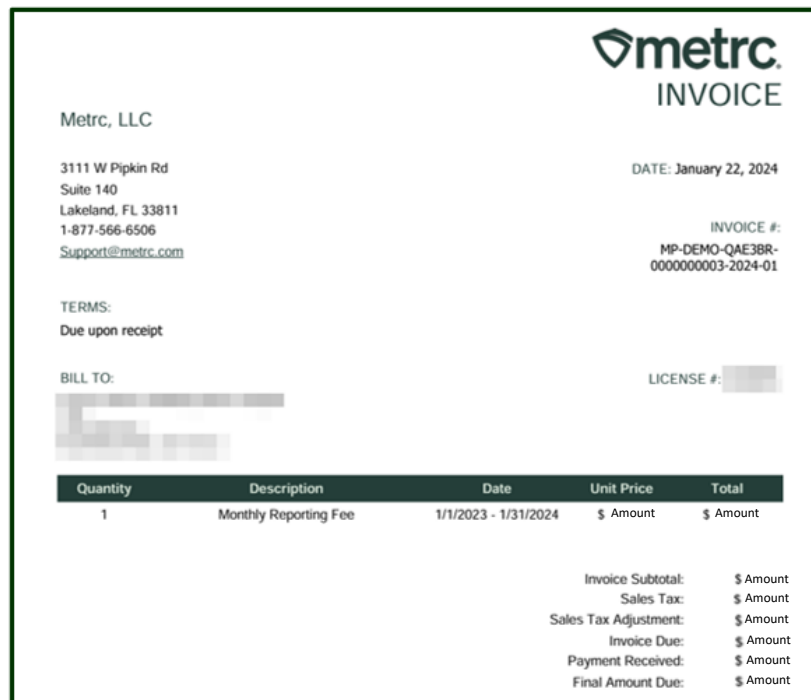
## Invoices overview

The information provided below is important to understand as it relates to invoices, including what will be visible, or may be visible, depending on account status.

- Beginning on the first day of the first full calendar month, an invoice will be generated in the Open invoices tab in the Invoices grid and show the total amount due for that period, including the Metrc reporting fee and any applicable taxes as defined by state and local taxing authorities.
- The generation of a monthly invoice will automatically occur in the system on the first day of every month.
- Sales tax assessment is enabled, so Metrc will now be able to calculate applicable sales tax on the monthly reporting fee.

For periods prior to the release of this new functionality, the following will apply:

- For previously paid periods (balances are paid in full), invoices will not be retroactively created or show up in the Closed Invoices tab of the Invoices grid.
- For previously unpaid periods, a single invoice will be generated that reflects the entire amount owed to Metrc at the time of this functionality release and will appear in the Open Invoices tab of the Invoices grid. *See example invoice below.*



Metrc LLC  
 For additional support,  
 please visit [Support.Metrc.com](https://Support.Metrc.com)

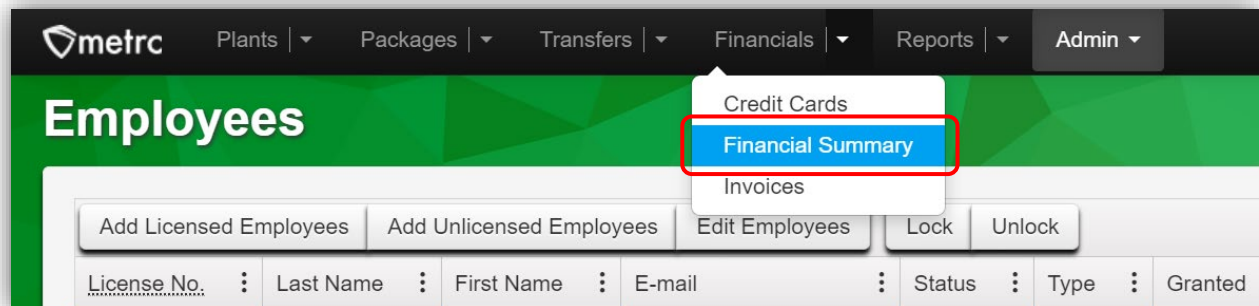
**Important note:** Access to invoices, and the ability to download and/or print, will be available from the Invoices grid. Direct access will offer greater efficiencies, including real-time ability to view and/or manage invoices in a singular location and limit incoming or outgoing communications to/from Metrc.

**Recommendation:** Designate additional financial managers so that all appropriate employees can access invoices and/or make payments.

### Financial Summary

If payments are received in advance of monthly reporting fees being due or an approved credit is issued by Metrc, the new Financial Summary grid will offer real-time account status into Available Credits.

To access the Financial Summary grid, go to the Financials area dropdown on the navigational toolbar and select the Financial Summary option – **see Figure 11.**



**Figure 11: Navigating to the Financial Summary grid**

The Available Credits in the Financial Summary grid will display any available credits that are available to apply to future monthly Metrc fees. If the account is up to date, Available Credits will display \$0.00. The Financial Summary page will not display late payments or negative amounts – **see Figure 12.**



**Figure 12: Available Credits in Financial Summary grid**



## Payment options reminder

Maintaining a valid payment method on file to pay for all incurred and recurring Metrc fees will simplify payment processes. Two payment options are available:

### Pay by credit card – *Recommended*

To review, update, or add a credit or debit card, select the Financials area dropdown on the navigational toolbar, then select Credit Cards – see **Figure 13**.

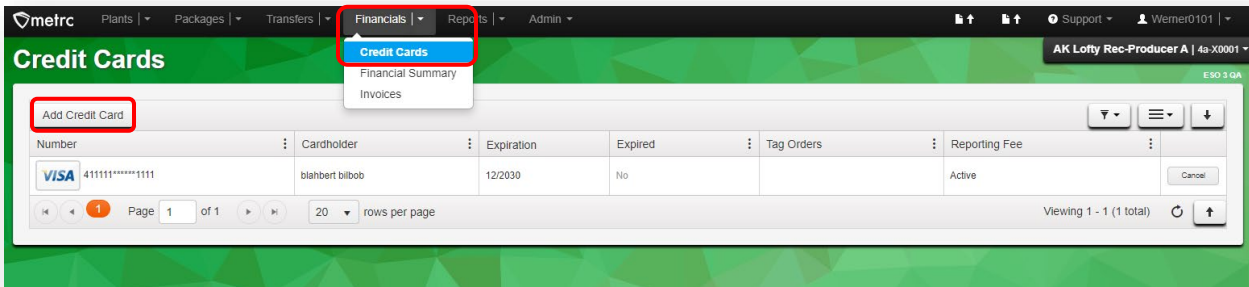
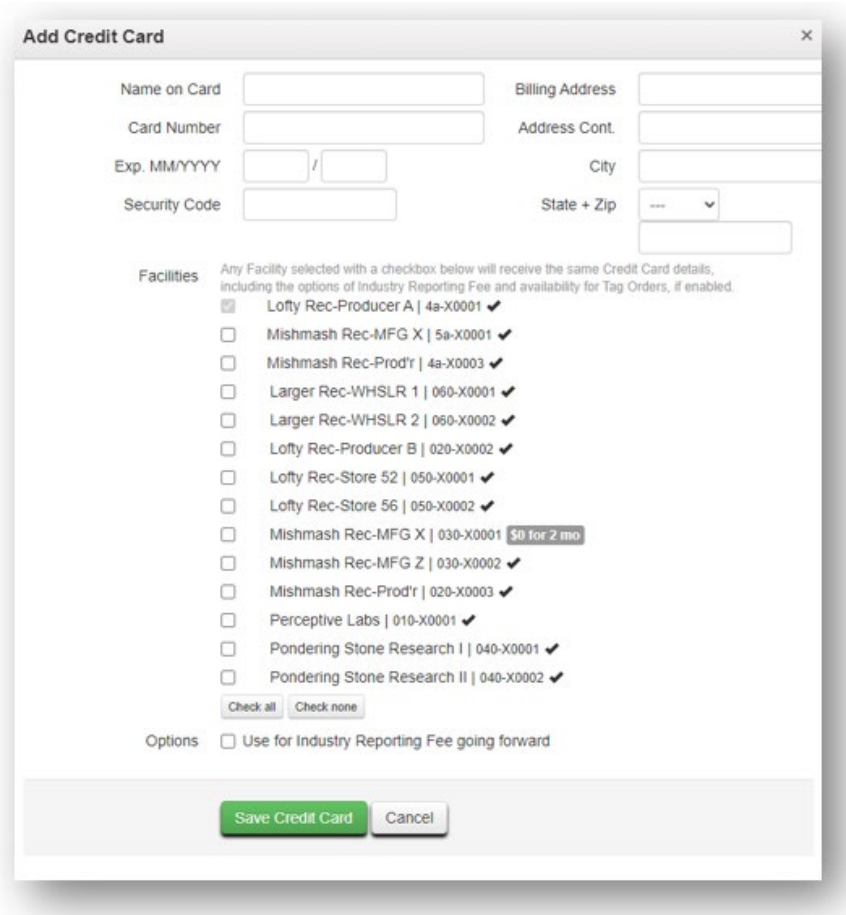


Figure 13: Credit Cards grid

To add a new card for one or more facilities, select the Add Credit Card button to open the Add Credit Card action window. Complete all required information, including selection of facilities to receive the same credit card details and checkbox option(s) to use the credit card for Industry Reporting Fees going forward, or availability for Tag Orders, if enabled. When complete, click the Save Credit Card button – see **Figure 14**.



**Add Credit Card**

Name on Card  Billing Address

Card Number  Address Cont.

Exp. MM/YYYY  /  City

Security Code  State + Zip

**Facilities** Any Facility selected with a checkbox below will receive the same Credit Card details, including the options of Industry Reporting Fee and availability for Tag Orders, if enabled.

- Lofty Rec-Producer A | 4a-X0001 ✓
- Mishmash Rec-MFG X | 5a-X0001 ✓
- Mishmash Rec-Prod'r | 4a-X0003 ✓
- Larger Rec-WHSLR 1 | 060-X0001 ✓
- Larger Rec-WHSLR 2 | 060-X0002 ✓
- Lofty Rec-Producer B | 020-X0002 ✓
- Lofty Rec-Store 52 | 050-X0001 ✓
- Lofty Rec-Store 56 | 050-X0002 ✓
- Mishmash Rec-MFG X | 030-X0001 **\$0 for 2 mo**
- Mishmash Rec-MFG Z | 030-X0002 ✓
- Mishmash Rec-Prod'r | 020-X0003 ✓
- Perceptive Labs | 010-X0001 ✓
- Pondering Stone Research I | 040-X0001 ✓
- Pondering Stone Research II | 040-X0002 ✓

**Options**  Use for Industry Reporting Fee going forward

**Figure 14: Add Credit Card action window**

In addition, payments can be made via check or money order and sent to the following address:

Metrc LLC  
 4151 South Pipkin Rd.  
 Lakeland, FL 33811

## Reporting Fee notifications reminder

As our organization continues to innovate our system to better meet the needs of our state agency partners and industry users, we want to provide more information on new functionality that will be released on August 1<sup>st</sup> in Nevada to improve the payment experience of monthly fees, ensure all licensed businesses remain current on payments due, and additionally, remain compliant with license requirements.

Metrc considers every unique license number that is (a) credentialed in the system, and (b) in an “Active” status as set forth by the state’s rules for any 1 day of any 1 month as having a financial liability for the license for that period, regardless of the business’s use or non-use of the system so that the state may report on that license’s existence.

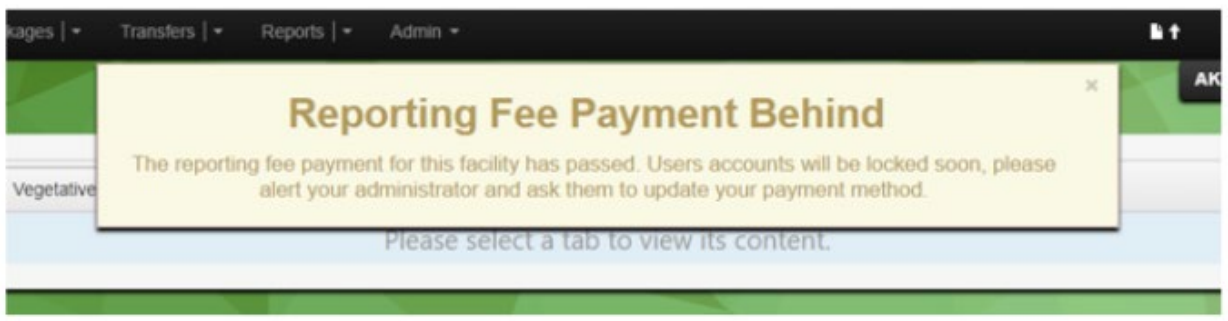
Please read on for more details regarding new functionality and what you may experience in Metrc if your license is past due on payment(s).

### Credentialing – No payments past due

While previously a multi-click, post onboarding exercise, now, when a new license is credentialed in Metrc, an “*Add Payment on File*” screen will auto-populate to make it easier for the Admin to add a preferred credit card on file.

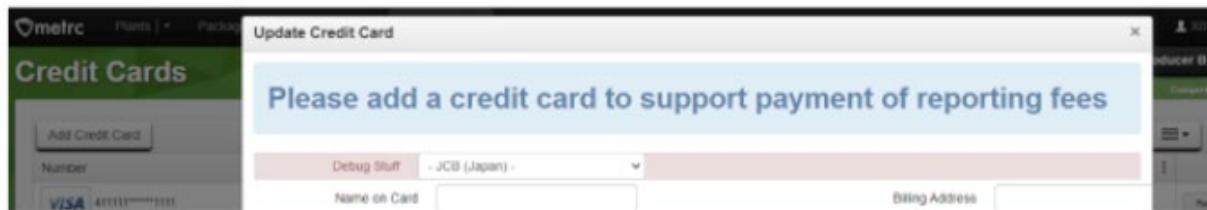
### Alert Phase – Payment is 30 days past due

- Upon logging in to Metrc, all users will see a yellow banner at the top of the screen stating their industry support fee is not up to date – see *below*.

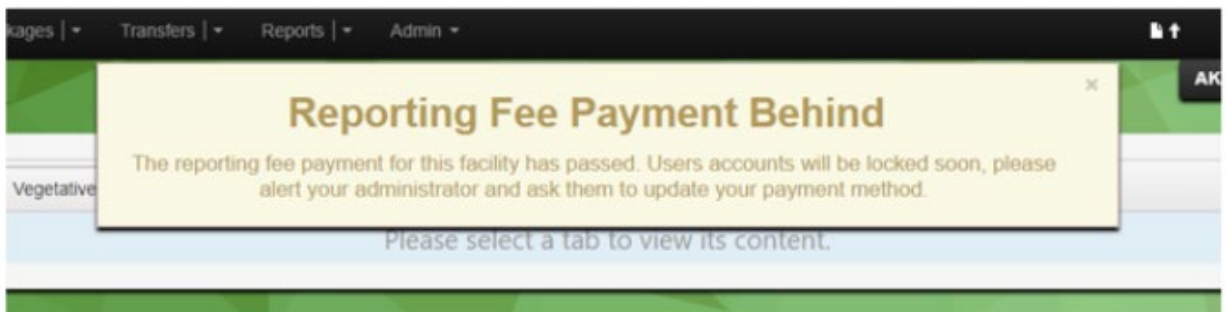


**Warning Phase – Payment is 60 days past due (30 days prior to system access suspension)**

- Financial users will receive a “*Please add a credit card to support payment of reporting fees*” pop-up window with actionable fields to fill in upon logging into Metrc. We are allowing this to remain “optional” during the Warning Phase such that all system access will remain in place should the users elect to not make payment at that time – see *below*.



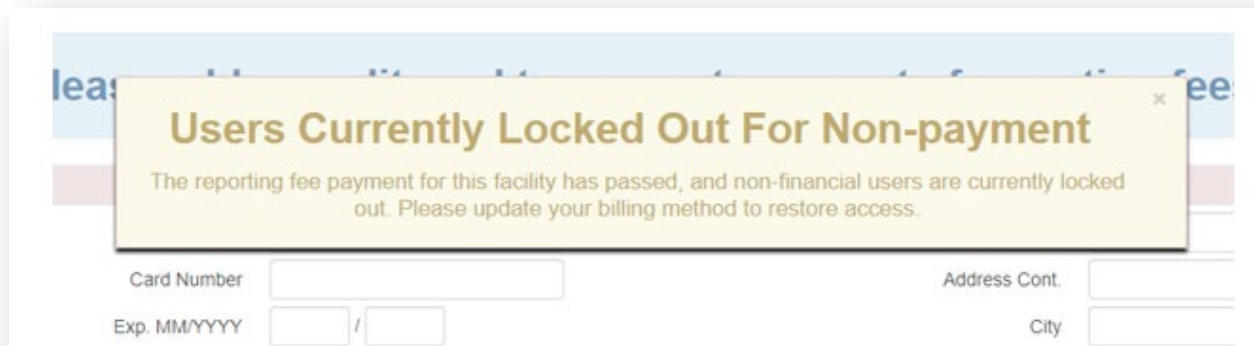
- All other, non-financial users will receive a “*Reporting Fee Payment Behind – The reporting fee payment for this facility has passed. User accounts will be locked soon, please alert your administrator and ask them to update your payment method.*” pop-up window upon logging into Metrc – see *below*.



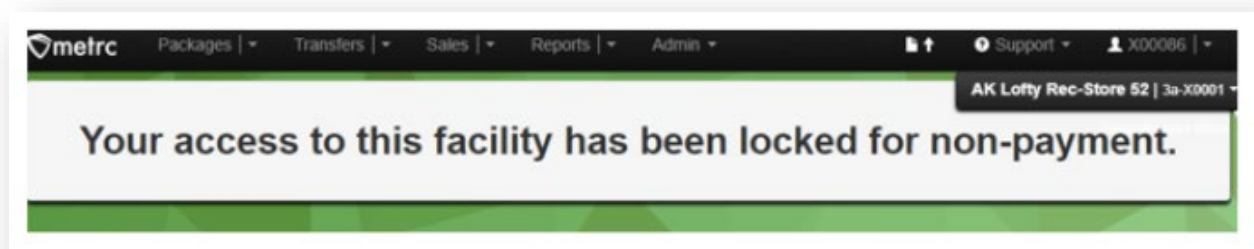
## Enforcement Phase – Payment is 90 days past due

- Financial users will receive a “*Users Currently Locked Out For Non-Payment – The reporting fee payment for this facility has passed, and non-financial users are currently locked out. Please update your billing method to restore access.*” pop-up window with actionable fields to fill in upon logging into Metrc. Payment is no longer optional and to regain access to the system, payment must be brought current to less than 90 days. Any subsequent delinquencies that reach 90 days will again trigger account suspension.

Please note that effective immediately on deployment of the new functionality that all licenses that are already 90 days past due will have their accounts suspended.



- All other, non-financial users will receive a “*Your access to this facility has been locked for non-payment.*” pop-up window upon logging into Metrc. These users should contact their administrator to resolve the situation – see *below*.



To remain compliant with all license requirements, it is important that your payments to Metrc remain current and balances due are paid on time. In doing so, users should not experience the functionality noted above when logging in and using the Metrc system.

If you are unsure if your license is past due on payments, you can request that your Admin or financial user log in to Metrc to review payment status and to make sure a current form of payment is on file.

We value our relationship and take pride in supporting the success of your business operations. For questions regarding the amount owed, payment setup, or other account-related inquiries, please submit a case in the [Metrc Support Portal](#) or by phone at 877-566-6506. Please provide your license # and Metrc username to aid in the inquiry process.

## Metrc resources

If you have any questions or need additional support, the following resources are available:

### Contact Metrc Support

By using the new full-service system by navigating to [Support.Metrc.com](https://Support.Metrc.com), or from the Metrc System, click Support and navigate to [support.metrc.com](https://support.metrc.com) and it will redirect to the portal.

*Please note:* If accessing the portal for the first time, a username (which is established when logging in), the respective state and “Facility license number”, and a valid email to set a password are required.

### Metrc Learn

Metrc Learn has been redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies. Accessing the new [Metrc Learn](#) LMS is simple through multiple convenient locations:

#### ***From within the Metrc system***

Navigate to the Support area dropdown on the navigational toolbar and select “Sign up for Training” to register.

#### ***From the Metrc website***

Navigate to your [state’s partner page](#) and scroll down to the “Metrc’s Training Resources” section to find the link.

Also, save the link – [learn.metrc.com](https://learn.metrc.com) – as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

Thank you for your continued partnership.