

Bulletin Number: IL_IB_0028	Distribution Date: 09/10/2026	Effective Date: 09/10/2026
Contact Point: Metrc Support	Subject: IDFPR AU to AU/MED Transition	
Reason: To assist Adult Use (AU) dispensaries in their transition to adult use <i>and</i> medical (AU/MED) dispensaries.		

Greetings,

This document is to be used to assist Adult Use (AU) dispensaries in their transition to adult use *and* medical (AU/MED) dispensaries. It covers how to report medical receipts to Metrc, along with a useful patient lookup. While Metrc will be sending out a notification to TPIs informing them they may have customers transitioning to AU/MED sales, we strongly encourage licensees to communicate with their TPI providers to determine a timeline for when they will be going live with MED sales.

Please read on for more detailed information.

Updating Employee Permissions

Before beginning, it is important to ensure that the employees who will be checking patient/caregiver statuses has the appropriate permissions to do so. Permissions can be updated by the Admin or anyone with the “Manage Employees” permission by navigating to the “Employees” area under the “Admin” tab, selecting the appropriate employee and clicking the “Edit Employee” button- **see Figure 1**.

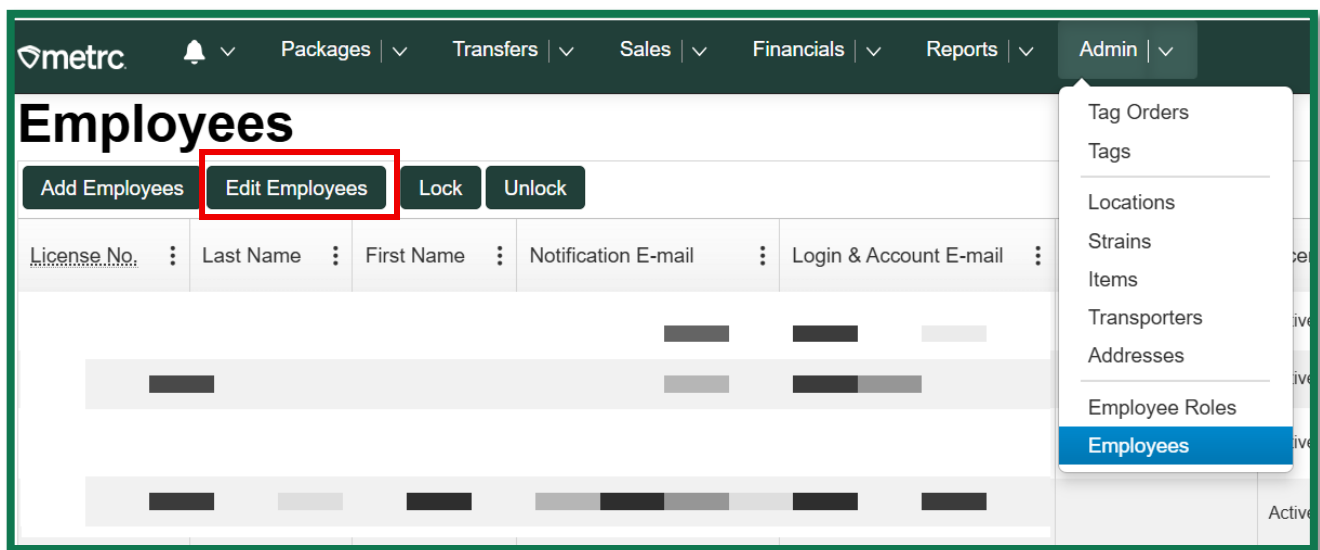


Figure 1: Edit Employees in Admin tab

Once in the “Edit Employees” screen, ensure that the patient status and caregiver status lookup options are selected and click “Save Employee” – **see Figure 2**.

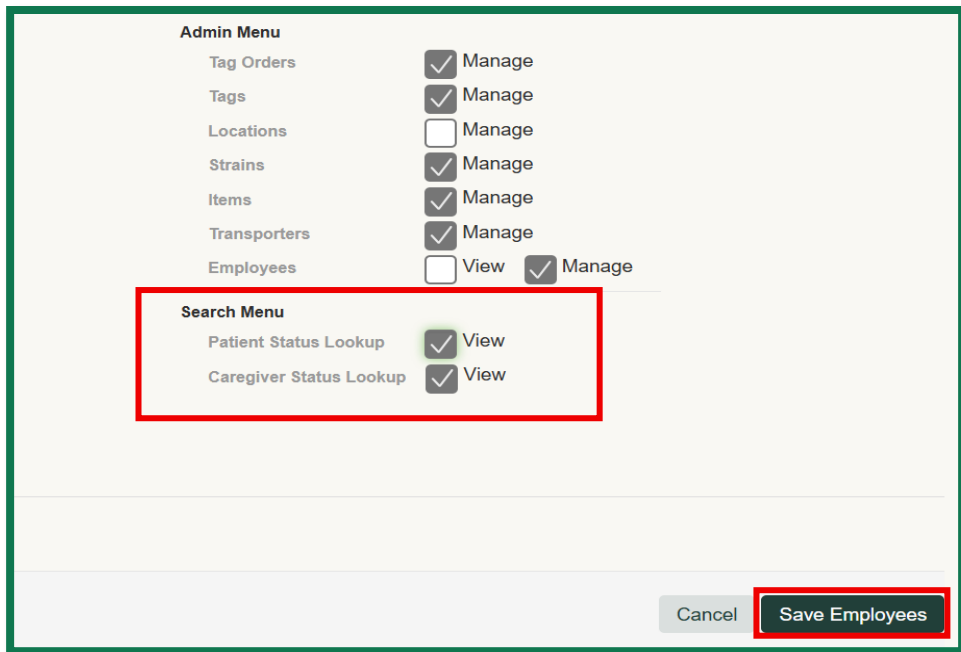


Figure 2: Status Lookup Permissions in Edit Employees action window

Validating Patient and Caregiver IDs

At the top right of the screen, select the magnifying glass to expand the option for Patient Status Lookup. Select Patient Status Lookup to open the search action window – see Figure 3.

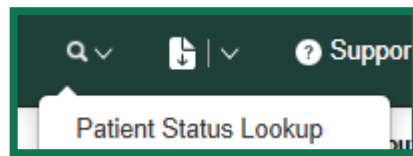


Figure 3: Selecting Patient Status Lookup

From the Patient Status Lookup window, enter the Patient or Caregiver ID to validate the number and their available purchase limits. The format for patients or caregivers is (a) two or three letters indicating patient or caregiver type, (b) dash, and (c) 8 or 9 number or letter digits (e.g., QP-AAAAAA1111).

Note: The Purchase Limits for the Caregiver ID is set to zero. This is because purchases are associated with the Patient ID and not the Caregiver ID. This will be covered later in this bulletin.

In the example below, the Medical Patient number along with their Purchase Amount Days, Purchase Limit, Status and Start/Expiration are visible.

Note: If a Patient's Reg Status is set to Expired, and their expiration dates are not expired, please have the Patient contact the Illinois Department of Public Health (DPH). In the case of a Patient having a Valid/Active status with an expired card, please do not sell to the Patient and have them contact DPH.

The screenshot shows a web application titled "Patient Status Lookup". At the top, there is a search bar with the text "Patient" and a dropdown menu showing "QP-TEST2026". To the right of the dropdown is a "Look Up" button. Below the search bar is a table with the following columns: Patient, ID Method, Reg. No., Reg. Status, Reg. Start, Reg. Expires, Flower Avail, THC Avail, Conc Avail, and Info Avail. The table contains one row with the following data: Patient: QP-TEST2026, ID Method: (blank), Reg. No.: (blank), Reg. Status: Valid, Reg. Start: 01/19/2026, Reg. Expires: 01/16/2028, Flower Avail: 0 Ounces, THC Avail: 0 Ounces, Conc Avail: 0 Ounces, Info Avail: 0 Ounces. Below this table is another table with the following columns: Pur Amt Days, Flower Lmt, THC Lmt, Conc Lmt, Info Lmt, Max Flower THC %, Max Conc THC %, Flower Pur, THC Pur, Conc Pur, and Info Pur. The table contains one row with the following data: Pur Amt Days: 14, Flower Lmt: 0 Ounces, THC Lmt: 0 Ounces, Conc Lmt: 0 Ounces, Info Lmt: 0 Ounces, Max Flower THC %: 0.00%, Max Conc THC %: 0.00%, Flower Pur: 0 Ounces, THC Pur: 0 Ounces, Conc Pur: 0 Ounces, Info Pur: 0 Ounces. At the bottom of the interface, there is a pagination bar showing "Page 1 of 1" and a "Viewing 1 - 1 (1 total)" message.

Patient	ID Method	Reg. No.	Reg. Status	Reg. Start	Reg. Expires	Flower Avail	THC Avail	Conc Avail	Info Avail
QP-TEST2026			Valid	01/19/2026	01/16/2028	0 Ounces	0 Ounces	0 Ounces	0 Ounces

Pur Amt Days	Flower Lmt	THC Lmt	Conc Lmt	Info Lmt	Max Flower THC %	Max Conc THC %	Flower Pur	THC Pur	Conc Pur	Info Pur
14	0 Ounces	0 Ounces	0 Ounces	0 Ounces	0.00%	0.00%	0 Ounces	0 Ounces	0 Ounces	0 Ounces

Figure 4: Verifying Patient ID and Purchase Limits

If a Caregiver were purchasing on behalf of the Patient, enter the Caregiver ID to validate the Patient they are purchasing on behalf of. The search feature will instead just show the qualifying Patient ID (**Figure 5 below**), which can then be copied and searched to view their allotment (**Figure 4 above**).

Patient Status Lookup

Patient:

Patient	ID Method	Reg. No.	Reg. Status	Reg. Start	Reg. Expires	Flower Avail	THC Avail	Conc Avail	Info Avail
MCG-4845437		MQP-0014337	Valid	04/10/2025	10/07/2025	0 Ounces	0 Ounces	0 Ounces	0 Ounces

Pur Amt Days	Flower Lmt	THC Lmt	Conc Lmt	Info Lmt	Max Flower THC %	Max Conc THC %	Flower Pur	THC Pur	Conc Pur	Info Pur
14	0 Ounces	0 Ounces	0 Ounces	0 Ounces	0.00%	0.00%	0 Ounces	0 Ounces	0 Ounces	0 Ounces

Page 1 of 1 | 20 rows per page | Viewing 1 - 1 (1 total)

Figure 5: Caregiver ID lookup

Recording Sales Receipts for Patients and Caregivers

Navigate to the Sales area on the navigational toolbar and select the Receipts option from the drop-down menu – see Figure 6.

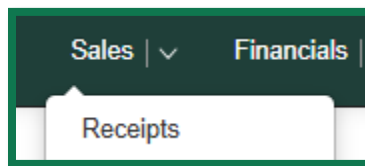


Figure 6: Navigating to the Sales Receipts Table

On the Sales Receipts grid, select the Active tab to view unfinalized Sales Receipts. To record a sale, select Record Receipts – see Figure 7.

metrc | Packages | Transfers | **Sales** | Financials | Reports | Admin

Sales Receipts | New UI | Illinois Testing | AU Dispensary | 050-X0001

Import Sales | Daily Sales (read-only)

Active | Inactive

Record Receipts | Edit Receipts | Finalize

Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized
No data is available to display.							

Page 0 of 0 | 20

Figure 7: Sales Receipts Table

When recording a Sales Receipt for a Patient, select Patient as the Customer, enter the Package Tag Number(s) that is/are being sold to the Patient, the Quantity, Unit of Measure and Total Price – **see Figure 8**.

When recording a Sales Receipt for Caregiver purchasing on behalf of a Patient, you will select Caregiver as the Customer and enter the Caregiver ID along with the Patient ID. Then fill out the rest of the information as mentioned above – **see Figure 9**.

The screenshot displays the 'Record Receipts' window with a dark green header and a close button (X) in the top right corner. The main content area is titled 'Sales Receipt # 1' and includes a '(clear)' button. The 'Sale Date/Time' section shows a date picker set to '08/21/2026' with a 'today' button, and a time picker set to '12 : 10 PM'. The 'Customer' section has radio buttons for 'Consumer', 'Patient' (selected), 'Caregiver', and 'Non-resident Consumer'. Below this, the 'Patient No.' field contains 'QP-0000IMQ8V'. The 'Package # 1' section shows a package icon, a search bar with '1A4FF0300000016000002252', a '(clear)' button, and a 'Quantity' of '1' with a unit of measure dropdown set to 'Each' and a 'Max' button. The 'Total Price' is shown as '\$ 10.00'. An 'Available' field shows '86.5 ea'. A 'Transaction Details' section is visible below. At the bottom, there is a '+ (package)' button and a '+ 1' button. The bottom right corner has 'Cancel' and 'Record Sales Receipts' buttons.

Figure 8: Recording a Patient Sales Receipt

Record Receipts

Sales Receipt # 1 (clear)

Sale Date/Time: 08/21/2026 today 12:10 PM

Customer: ☐ Consumer ☐ Patient ☒ Caregiver ☐ Non-resident Consumer

Caregiver No.: MCG-0000IHE9Z

Patient No.: MQP-0000IHK2A

Package # 1: 1A4FF0300000016000002252 (clear) Quantity: 1 Each Max

Available: 86.5 ea Total Price: \$ 10.00

Transaction Details

+ (package)

+ 1

Cancel Record Sales Receipts

Figure 9: Recording a Sales Receipt for a Caregiver Purchasing on Behalf of a Patient

Once Sales Receipts have been Recorded, they will display on the Active Sales Receipts table – see Figure 10.

Sales Receipts New UI Illinois Testing MED Dispensary | 050-X0002

Import Sales Daily Sales (read-only)

Active Inactive

Record Receipts Edit Receipts Finalize

Receipt	Sales	Customer Type	Patient	Caregiver	Packages	Total	Recorded	Finalized	
0000000481	08/21/2026 12:10 pm	Caregiver	MQP-0000IHK2A	MCG-0000IHE9Z	1	\$10.00	08/21/2026 12:14 pm	No	View

Page 1 of 1 20 Viewing 1 - 1 (1 total)

Figure 10: Sales Receipts Table with Record Sales Receipts

Once a Sales Receipt has been recorded, it can be Finalized by highlighting the Sales Receipt and selecting Finalize at the top of the table. This will move the Sales Receipt from the Active table to the Inactive table.

Note: Sales Receipts that have not been edited within seven days of the recorded transaction will automatically Finalize.

A recorded Sales Receipt will update the Patient Purchase Limits immediately after being recorded, as the Patient's Sales Receipt that was recorded caused their purchases to be pulled from their limits – see Figure 11.

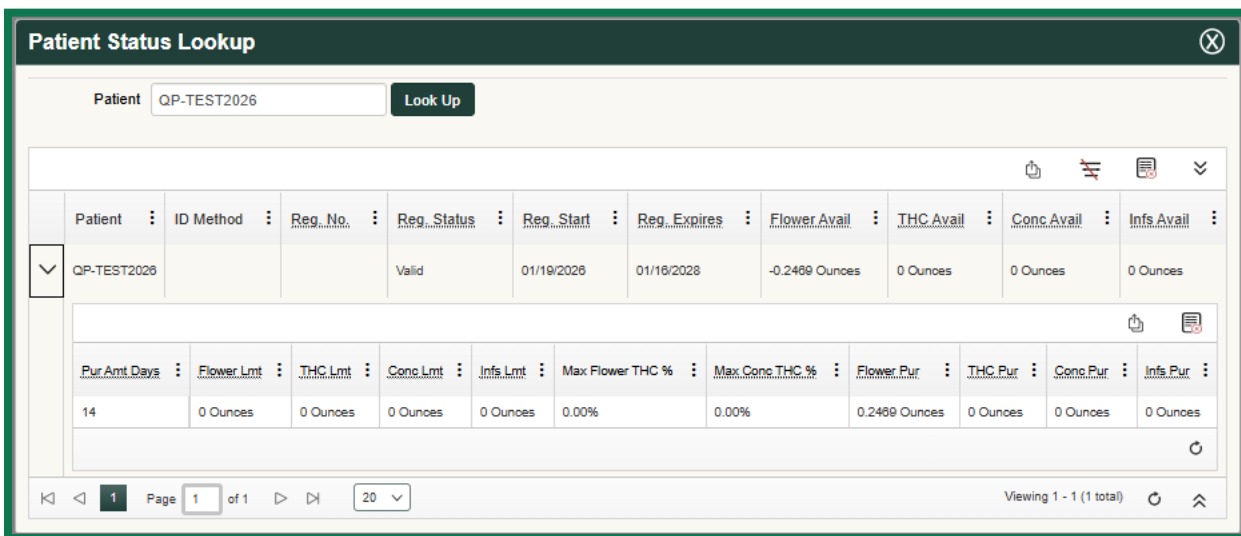


Figure 11: Patient Status Lookup Post-Sales Receipt Recording

Patient Allotments

Medical patients are allowed to purchase 2.5 ounces of flower every 14-day period. 2.5 ounces of flower is equivalent to 21.3 grams of concentrate and 21,300 milligrams of infused edibles. This calculates to 1 gram of concentrate equals 2.66 grams of flower or 1,000 milligrams of infused edibles equaling 3.33 grams of flower.

When sales are recorded in Metrc, all non-flower products will deduct from the 2.5 ounce flower limit, according to the equivalencies below. For example, if you sold an edible with 1,000 milligram unit weight, the limit would deduct 3.33 grams from the flower limit.

Flower	Concentrate Equivalency	Infused Edibles Equivalency
2.5 ounces	26.6 grams	21,300 milligrams
2.66 grams	1 gram	
0.333 grams		100 milligrams

Working With TPI/POS Vendor

Make sure to communicate with your TPI/POS vendor if you will begin making medical sales as an AU/MED dispensary. You want to ensure they know:

1. The date you plan to be granted your permission to sell to patients
2. The date you will begin selling to patients
3. Any additional information requested by your TPI/API for enabling this (some TPIs set up alerts or limits for medical sale receipt).
4. Ensure that you are setting the correct medical tax rate for medical cannabis sales. For more information regarding medical tax rates, please contact the Illinois Department of Revenue at 1-800-732-8866.

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 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](https://learn.metrc.com) platform is simple:

From within the Metrc system

- Navigate to the drop-down Support menu in 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* – 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.

Metrc Expert

In the Metrc system, click on widget icon in the lower right-hand corner to open the Metrc Expert knowledge base to access step-by-step guides, ask questions, and more.

Thank you for your continued partnership.