

Bulletin Number: MT_IB_0015	Distribution Date: 5/28/20	Effective Date: 6/2/20
Contact Point: Metrc® Support	Subject: Upcoming Release in Metrc and CSV Formatting Guide Update	
Reason: Metrc is providing an update on our upcoming feature release related to resetting Patient Limits, Plant Batches, Additional information fields, Sales actions associated with finished packages, and an updated CSV Formatting Guide.		

Greetings Metrc Users,

This bulletin provides information on the latest enhancements to Metrc, which will become effective on **June 2nd, 2020**. The enhancements are listed below will be released on **June 1st, 2020**. **Metrc would also like to encourage licensees to reference the Untethering Update Information released within Bulletin #14.**

- I. Untethering Limit Tracking Update
- II. Additional Functionality for Plant Batches
- III. Added "Packaged By" field to all Package popovers
- IV. Added the "Strain" column to Lab Samples grids
- V. Finished Packages must be unfinished before users can edit or record sales to the package
- VI. Updated CSV Upload Guide
- VII. Bulletin Archive Update

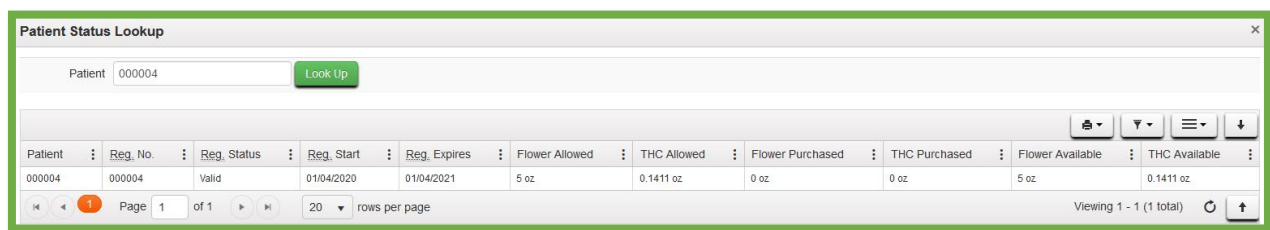
Detailed descriptions of each change are provided on the following pages:

Untethering Limit Tracking Update

Starting on **June 2nd, 2020**, Providers will be required to record a patient sale in real time and patients will now have purchasing limits with equivalencies based on Flower and THC allotments that **will reset on the 1st of every month**. Additional information on these equivalencies and limits were outlined within Bulletin 14.

If a licensee experiences a patient whom they believe their status has not reset, the licensee needs to take the following steps:

1. Toggle to the Patient Status Lookup in Metrc
2. Enter the Patient Number exactly as it appears for the patient card number
3. Take a screenshot of the Patient Status Lookup



Patient	Reg. No.	Reg. Status	Reg. Start	Reg. Expires	Flower Allowed	THC Allowed	Flower Purchased	THC Purchased	Flower Available	THC Available
000004	000004	Valid	01/04/2020	01/04/2021	5 oz.	0.1411 oz.	0 oz.	0 oz.	5 oz.	0.1411 oz.

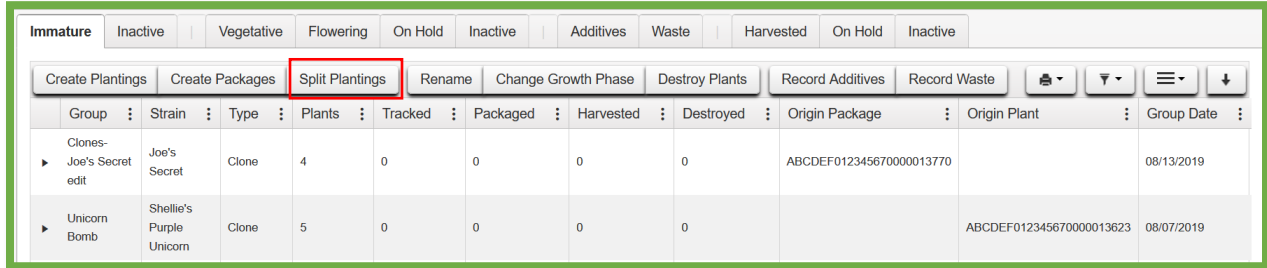
Figure 1: Patient Status Lookup

4. Please email support@metrc.com with the screenshot and the date/time the screenshot was taken. **Please do not email in the same screenshot if you are stating the issue is occurring multiple times.**
5. If the issue is believed to be resolved prior to feedback from Metrc, it is also extremely helpful to send confirmation back to Metrc Support so this issue can properly be managed.

The Metrc team wants to thank all licensees who reach out and provided very helpful information on any issue or matter that arises. The Metrc team also wants to express appreciation to those who follow the steps above to ensure accurate and up to date information is in place so that it can properly be reviewed and corrective action can be taken based on the information provided.

New Feature: Plant Batch Enhancements

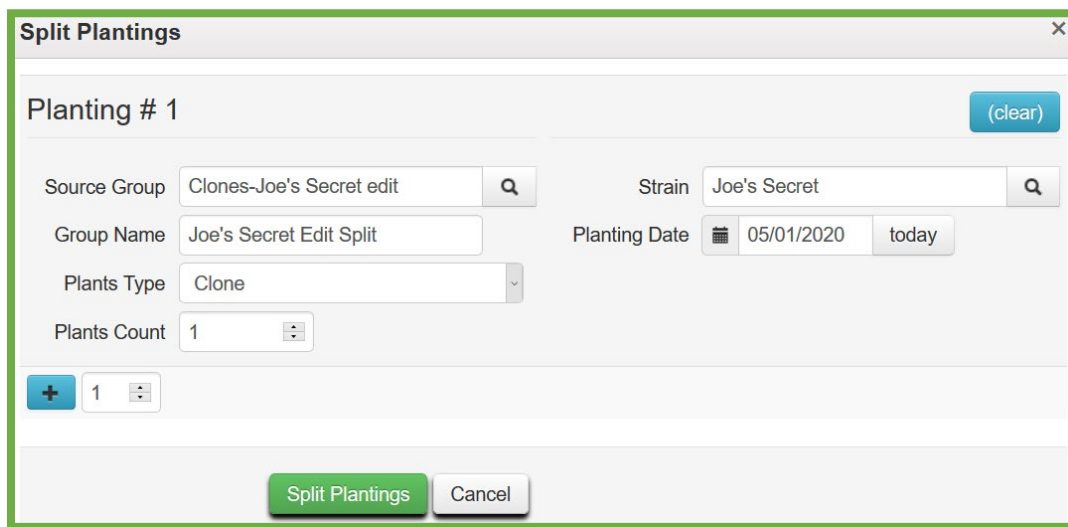
Cultivation users are now able to "split" immature plant batches after creation, as seen in **Figures 2 and 3**. Please note that there is no way to undo this action nor merge different plant batches.



<div> Immature Inactive Vegetative Flowering On Hold Inactive Additives Waste Harvested On Hold Inactive </div>											
<div> Create Plantings Create Packages Split Plantings Rename Change Growth Phase Destroy Plants Record Additives Record Waste </div>											
Group	Strain	Type	Plants	Tracked	Packaged	Harvested	Destroyed	Origin Package	Origin Plant	Group Date	
Clones- Joe's Secret edit	Joe's Secret	Clone	4	0	0	0	0	ABCDEF012345670000013770		08/13/2019	
Unicorn Bomb	Shellie's Purple Unicorn	Clone	5	0	0	0	0		ABCDEF012345670000013623	08/07/2019	

Figure 2: Select the Immature Plant Batch to Split

Once the user selects the split plantings option, they will see an action window where they will complete the information about the new planting, including plant count, plant batch name, Strain, and plant date. Once this information is completed, the user will select "Split Plantings" Button.



Split Plantings

Planting # 1 (clear)

Source Group

Strain

Group Name

Planting Date
 today


Plants Type

Plants Count

1

Figure 3: Split Plantings Action Window

New Feature: "Packaged By" Field in All Package Popovers

A popover grid is displayed by hovering the mouse over the  symbol anywhere in Metrc. In addition to all of the package and item information, newly added is a "Packaged By" field that will display the facility license number that created the package.



1A4FF030000026000000395					
Type	Product	Unit Volume	N/A	Product Requires Remediation	No
Source Harvest(s)	N/A	Unit Weight	1 oz	Contains Remediated Product	No
Source Package(s)	N/A	Unit Quantity	N/A	Administrative Hold	No
Location	N/A	Item Serving Size	N/A	Packaged By	A11-0000002-LIC
Location Type	N/A	Item Supply Duration Days	N/A	Packaged Date	05/01/2020
Patient	N/A	Quantity	10 ea	Received Date	N/A
Item	Burnt Brownies	Note	N/A	Received From License	N/A
Item From License No.	N/A	Production Batch	No	Received From Facility	N/A
Item From Facility	N/A	Trade Sample	No	Status	Active
Category	Edible (weight - each)	Donation	No		
Item Strain	N/A	Source Package Donation	No		
Unit CBD Percent	N/A	Donation License No.	N/A		
Unit CBD Content	N/A	Donation Facility	N/A		
Unit CBD Content Dose	N/A	Initial Lab Testing	NotSubmitted		
Unit THC Percent	N/A	Lab Testing	NotSubmitted		
Unit THC Content	N/A	Lab Testing Date	05/01/2020		
Unit THC Content Dose	N/A	Process Val. Sample	No		

Figure 4: Package Popover Menu

New Feature: Lab Results "Item Strain" Field

Users within testing facilities who have the View Packages permission have access to a new Lab Samples tab on the Packages page. Newly added to the Lab Samples grid is the "Item Strain" field, which will populate with the Strain of the item, if applicable.

Active

On Hold

Inactive

Lab Samples

In Transit

	Tag	Item	Category	Item Strain	Lab Testing
▶ 🔍 📊	1A4FF0300000C82000000018	Strawberry Shortcake Extract	Extract (weight)		TestPassed
▶ 🔍 📊	1A4FF0300000C82000000018	Strawberry Shortcake Extract	Extract (weight)		TestPassed
▶ 🔍 📊	1A4FF0300000029000000183	FOG Flower	Flower	FOG	AwaitingConfirmation
▶ 🔍 📊	1A4FF0300000029000000178	Yabba Dabba Doo Coffee	Edible (weight)		TestPassed
▶ 🔍 📊	1A4FF0300000C82000000033	Lemonade Concentrate	Other Concentrate (weight - each)		TestPassed

Figure 5: Lab Samples Grid "Item Strain" Field

New Feature: Editing and Recording Sales from Finished Packages

With this new update, users will no longer be able to record or edit sales receipts and deliveries from a finished package. Attempting to do so will result in the error message, as seen in **Figure 6**.

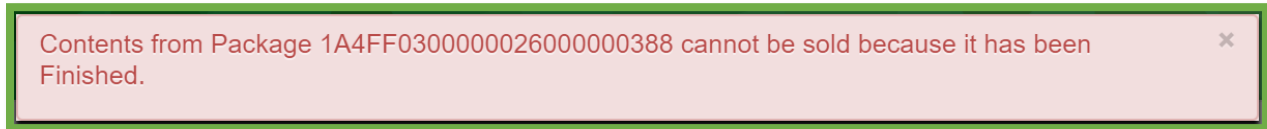


Figure 6: Finished Package Sale Error

Unfinishing Packages

To unfinish a package, the user will navigate to the Inactive tab on the Packages screen and select the package with which they want to perform a sales action. Once selected, the user will use the "Unfinish" button as seen in **Figure 7** and confirm the package you are unfinishing in the action window that follows.

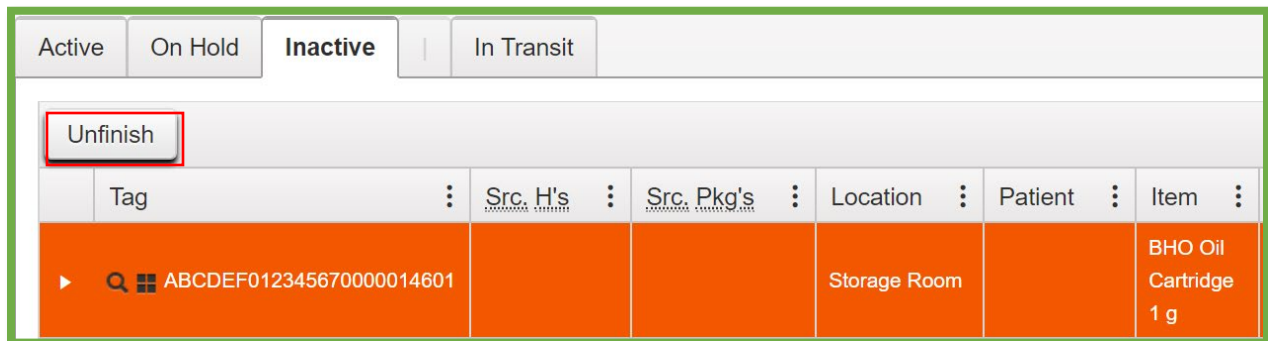


Figure 7: Unfinish Package

Once the package is unfinished, the user can make take any sales actions required. *Please note that if the sales actions are performed that results in a non-zero amount, the user will not be able to finish that package.*

Updated CSV Formatting Guide

Metrc Support has updated the CSV Formatting Guide, which can be found under the support tab on the top navigational bar, as seen in **Figure 8**.



Figure 8: CSV Formatting Guide

Metrc Bulletin Archive

Metrc is also excited to announce the release of our Bulletin Archive. By **May 29th, 2020** all Metrc Montana Bulletins will be published on the Metrc Montana [Webpage](#).

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