

Bulletin Number: LA_IB_0055	Distribution Date: 12/30/2024	Effective Date: 1/1/2025
Contact Point: Metrc Support	Subject: Patient and sales updates	
Reason: Guidance on new patient memberships, patient lookup, and sales in Metrc		

Greetings,

LDH and Metrc are providing details regarding the development of new functionality to the Patient Membership's Grid, a Patient Status Lookup tool, and new Sales requirements for patients.

For detailed information on new features and learning content, please read on.

Patient Memberships

To add a new patient membership, navigate to the Patient area on the navigational toolbar and select Memberships from the drop-down menu – **see Figure 1.**

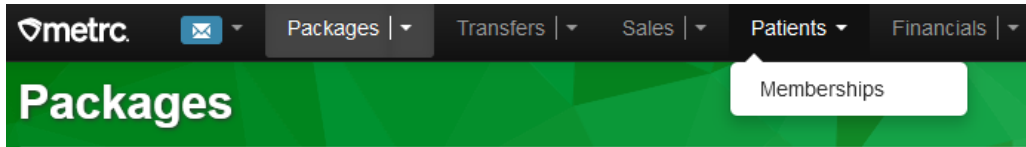


Figure 1: Patient Memberships

Once on the Patients Memberships grid, a license can add or edit current patient memberships. To support the patient limit requirements, Metrc will automatically be applying the standard limits to all patients that have been recorded.

- All patients will have a purchase amount days value of 14.
- All patients will have a default allotment of 2.5 ounces of Flower (for that 14-day period).

Metrc will require Patient Number entry after January 1st. This is not limited to sales receipts but applies to patient memberships and anywhere else that a patient number is entered or looked up in Metrc. Patient Number and other information should be entered before selecting the Register Patients button – **see Figure 2.**

A screenshot of the 'Add Patients' form in the Metrc application. The form has a title bar 'Add Patients' with a close button (X). Below the title bar, there is a section for 'Member Patient # 1' with a '(clear)' button. The form contains several input fields: 'License No.' (text input), 'Lic. Granted' (calendar picker set to 'today'), 'Lic. Expires' (calendar picker set to 'Granted +1 year'), 'Recom'd Plants' (text input with value '1'), 'Recom'd Oz.' (text input with value '4'), and 'Register Date' (calendar picker set to 'today'). At the bottom of the form, there is a '+ ' button and a text input field. At the very bottom, there are two buttons: 'Register Patients' (green) and 'Cancel' (grey).

Figure 2: Add Patients Action Window for Memberships

Patient Status Lookup

The Patient Status Lookup will help Pharmacies maintain visibility on the remaining amount a patient has to purchase and ensure a patient does not make purchases that total more than the permitted amount. Users with the ability to conduct sales will need to ensure they are granted the appropriate permission for Patient Status Lookup and Patient Memberships Lookup by someone who can grant those permissions at their facility.

The permission will be found within the “**Search Menu**” as shown in **Figure 2**.

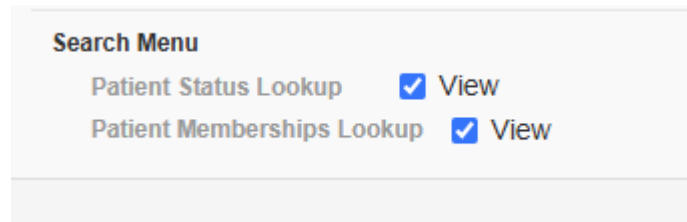


Figure 2: Employee Permission for Patient Status Lookup

Once permission is granted, the patient status lookup can be used. The patient status lookup is the magnifying glass in the top right-hand side of the navigational toolbar – see **Figure 3**.



Figure 3: Magnifying glass for Patient Lookup

When selecting the magnifying glass, this will open the Patient Status Lookup action window – see **Figure 4** below.

Patient Status Lookup ×

Patient

	Patient	ID Method	Reg. No.	Reg. Status	Reg. Start	Reg. Expires	Flower Avail	THC Avail	Conc Avail	Info Avail
▶	B27792779			Active	11/21/2024	11/21/2030	4 Ounces	0 Ounces	0 Ounces	0 Ounces

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

Figure 4: Patient Status Lookup

From the Patient Status Lookup, the Patient field can be populated with the patient ID, then select the Look Up button. The patient information will populate below to show the:

- Registration Status
- Registration Start (Date)
- Registration Expires (Date)
- Flower Available
- THC Available
- Concentrate Available
- Infused Available

Metrc resources and training feedback

Whether you choose to learn through our revamped user interface or the Go.Learn mobile application, available on the Apple Store and Google Play Store, training will continue to be more convenient and accessible.

To share feedback with the Metrc Training team, you can reach out directly at learn@metrc.com.

For general Metrc system-related inquiries, please submit a case with Metrc Support through the support portal.

Contact Metrc Support

Navigate 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.

Access additional resources

In the Metrc system, click on the Support area dropdown on the navigational toolbar and select the appropriate resource, including educational guides, manuals, and more.

We are excited to offer these new and improved learning tools and resources. Stay tuned for more updates and enhancements as we continue to develop Metrc Learn to better serve your needs.