Greetings Metrc Users,

This bulletin is to provide a follow up notice to all medical marijuana facilities on an Advisory Bulletin sent out by the MRA regarding facility errors and inaccuracies in Metrc. Per this bulletin that can be found at the following link: “The errors and inaccuracies detailed in this bulletin are in violation of the Medical Marijuana Facilities Licensing Act and the corresponding Administrative Rules. Further discovery of these errors or inaccuracies will result in facilities receiving violations from the Marijuana Regulator Agency Enforcement Division.”

Please find on the following pages a detailed description of the configuration changes:
Incorrect Unit Weights

It has been identified that growers and processors have incorrectly entered unit weight or unit volume for some of their marijuana products. This error will negatively impact patients’ daily and/or monthly purchase limits detailed in Rule 75.

For corrective action, the grower or processor must determine the unit weight or volume of the product as specified in Rule 61. This must be done before the package is created. No package should be shipped from a facility with an incorrect unit weight or volume associated to a package.

As a reminder, usable marijuana equivalency can be referenced in the chart displayed below.

<table>
<thead>
<tr>
<th>Marijuana-infused product type</th>
<th>Equivalent to 1 ounce of usable marijuana</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solid (chocolate bar, gummies, brownies)</td>
<td>16 ounces</td>
</tr>
<tr>
<td>Liquid (tinctures, topicals)</td>
<td>36 fluid ounces</td>
</tr>
</tbody>
</table>

If an item has been identified as incorrect for its unit weight or volume, the following steps can be done in Metrc to correct.

Step 1: Toggle to the items grid under the Admin tab in Metrc

Step 2: Identify the item that is in need of correcting on the unit weight or volume and select Edit Items
Step 3: Once Edit Items is selected, update the unit weight to properly represent what the total amount is per unit.

Step 4: Select the Save Items button to finalize the update to the original items with an incorrect unit weight.

Incorrect Amounts Sold

Provisioning centers need to be verifying the accuracy of their receipts for all patient purchases and correcting a receipt if there is a discrepancy found. When a patient purchase is incorrectly reported, the purchase limits for that patient can be impacted in Rule 75. If it is determined that the package sold had an incorrect unit weight for the item associated to that package, then the corrective action by a grower or processor must be made in the Incorrect Unit Weights section. Please note, that correction made by a grower or processor does not retroactively apply to purchases made at the provisioning center prior to the change.

If a provisioning center discovers that an existing sales transaction requires reconciliation due to an incorrect unit weight or volume from a cultivator or processor’s item that was created, an employee of that provisioning center should follow the steps below to correct their Sales Receipt. The steps to locate the incorrect patient sale and make the edit are captured below.

Step 1: Verify that the processor or cultivator has edited their item per the steps in the Incorrect Unit Weights section to reflect the appropriate unit weight or volume for the item that was sold.

Step 2: Identify the sales receipt number and package for which the item was associated to.

Step 3: Navigate to “Sales” on the navigation bar.
Step 4: Within the grid below, reference the Receipt column underlined in red and filter for the sales receipt number in Step 2.

<table>
<thead>
<tr>
<th>Receipt</th>
<th>Sales</th>
<th>Customer Type</th>
<th>Patient</th>
<th>Caregiver</th>
<th>Ident Method</th>
<th>Packages</th>
<th>Total</th>
<th>Recorded</th>
<th>Finalized</th>
</tr>
</thead>
<tbody>
<tr>
<td>00000000176</td>
<td>08/14/2019 12:00 AM</td>
<td>Patient</td>
<td>P-12345-123456</td>
<td>1</td>
<td>7.45</td>
<td>08/14/2019 12:22 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Step 5: Select the Receipt that needs to be corrected, and click the “Edit Receipts” button.

![Edit Receipts screenshot]

Step 6: If the Receipt has only one package, the user should select the “Clear” button which will remove the contents of the sale. If there are multiple packages on the Receipt, please refer to Step 10.

![Clear package screenshot]

Step 7: The user will be prompted to confirm that they are clearing the contents of the package and select “Ok.”

Step 8: Once the contents are cleared from the sales receipt, the agent should use the magnifying glass to pull up all active packages in Metrc.
Step 9: Select the package that was originally sold to the patient, and enter the quantity and price for that sale

Step 10: If the sales receipt that needs correction has multiple packages, then select the “Minus” button to remove the package

Step 11: Once the contents for the specific package are cleared from the sales receipt, the agent should use the (Plus) button to add a package back onto the sales receipt
Step 12: Once the package is added back to the sales receipt, the agent should use the magnifying glass to pull up all active packages in Metrc.

Step 13: Select the package that was originally sold to the patient, and enter the quantity and price for that sale.

**Duplicate Transactions**

It has been found that provisioning centers have encountered issues with third-party integrators which result in duplicate transactions for patients in Metrc. These duplicate transactions negatively impact patients’ purchase limits detailed in Rule 75. The provisioning centers will need to go in and void the duplicate transactions. To do this click on the duplicate receipt and then click the Edit Receipts button.
From the action window, the user will need to verify the duplicate receipt needs to be voided by clicking the OK button.

**Incorrect Patient/Caregiver Numbers**

Multiple provisioning centers have entered partial or incorrect patient and caregiver numbers into the statewide monitoring system. Per Rule 74(1)(a), the licensee verifies with the statewide monitoring system that the registered qualifying patient or a registered caregiver holds a valid, current, unexpired, and unrevoked registry identification card.

The statewide monitoring system validates only current, unexpired and unrevoked patient and caregiver numbers that are identical to the numbers printed on the registry cards.

For corrective action, provision centers must enter a valid patient and/or caregiver number in its entirety and in the correct format, including any capital letters and hyphens. Please see the examples of Michigan patient and caregiver numbers below:

- PT-19-987654
- CG-19-987654
- P987654-987654
- C987654-987654

Provisioning centers must also indicate if a caregiver is buying marijuana product for a patient per Rule 75(1)(b) and (2). To do this, a provisioning center must enter the patient number the caregiver is purchasing for as well as the caregiver’s number. A provisioning center cannot enter a caregiver’s own patient number into the statewide monitoring system if the caregiver is purchasing for a patient.

If a Provisioning Center discovers that an existing sales transaction requires reconciliation due to an incorrect patient or caregiver registry card number, an employee of that Provisioning Center should edit the Sales Receipt.

The steps to locate the incorrect patient sale and make the edit are captured below.

Step 1: Log into your Metrc account
Step 2: Navigate to “Sales” on the navigation bar

Step 3: Within the grid below, reference the Patient column underlined in red below to check for errors

<table>
<thead>
<tr>
<th>Receipt</th>
<th>Sales</th>
<th>Customer Type</th>
<th>Patient</th>
<th>Caregiver</th>
<th>Packages</th>
<th>Total</th>
</tr>
</thead>
</table>

To help refine the search, utilize the three-dot menu icon to the right of the column circled in red above to sort and filter the Patient information using the functionality seen below.

Step 4: Select the Patient that needs to be corrected, and click the “Edit Receipts” button

Step 5: Make the necessary edits to the sales receipts, then select “Update Sales Receipts” button
Please note that Provisioning Centers need to designate the correct customer type for every dispensation. The three types of customers are explained below.

- **Patient – Michigan Patient Cardholder**
  - Requires the correct patient registry number

- **Caregiver – Michigan Caregiver Cardholder (must have Michigan Patient Cardholder when purchasing)**
  - Requires the correct caregiver registry number
  - Requires the correct patient registry number

- **External Patient – Active Medical Marijuana Cardholder from Jurisdictions approved for Reciprocity**
  - Requires the correct patient number for the reciprocity purchasing patient
  - Requires the identification method and state for the patient
Over Sales to Patients

Multiple provisioning centers have sold to patients beyond the allotted monthly purchasing limit of 10 ounces per month. These sales were conducted either directly or through the qualifying patient’s registered primary caregiver. Per Rule 74(1)(c) and (2)(c), the licensee determines, if completed, that any transfer or sale will not exceed the purchasing limit in R333.275.

Prior to any sale, provisioning centers must check a patient’s purchasing limit status through the Patient Status Lookup function in the statewide monitoring system.

Employees will need to be granted the permission by the Metrc admin, or an employee who can edit employee permissions to be able to view a patient status. The permission will be found within the Search Menu for Provisioning Centers only.

Once the permission is granted to a user, the patient status lookup will be the magnifying glass in the top right-hand side of the toolbar.
When selecting the magnifying glass, you will be prompted to a patient lookup that will be the same as the example below.

Notes about the patient lookup:

- Michigan Patients will be designated with a valid or invalid status. A sale should not occur to an invalid patient.
- Patients from outside of Michigan will only have a flower purchased amount appear if they have made a previous purchase at a Michigan Provisioning Center within the last thirty days. If a patient has purchased in Michigan, but their purchase has occurred outside of the last thirty days, then they should be treated as a patient with the same available amounts as a new patient would have. Provisioning Centers will see these patients show as zero for their Flower Allowed, Purchased and Available.
- No dispensary will be able to see the purchases or previous locations of the patient.
- Flower Allowed, Flower Purchased, and Flower Available will designate the Medical Marijuana that is available. This will capture all items that are being sold, not just the flower product. Patient’s numbers must be entered exactly as they appear on their card.

Transfers Best Practices

The MRA has identified issues within the transfers section of the system where licensees are adjusting packages up or down when getting shipments from another licensee. It has also been found that licensees are attempting to virtually correct errors. As a reminder, transfers registered in Metrc are recorded in real-time. This means when the shipping licensee selects Register Transfer, then the receiving licensee will see the transfer within the incoming tab of their transfers. Every package arriving to a Provisioning Center should have passing test results associated to it. A package that is not compliant with the labeling and product category requirements should not be shipped or received.
If a physical or virtual part of the transfer process has been determined as incorrect, the licensees must ensure proper corrective action is taken. The following scenarios below are outlined as best practices for a licensee.

1. A receiving entity has the physical product packages at their facility that are accurate to the order, but the products on the Metrc transfer manifest are incorrect.
   a. Corrective Action – Prior to receipt of the transfer, the shipping entity can edit the transfer to place the correct packages for the transfer. Once the correct packages are verified by the receiving licensee, then they can accept the transfer and the packages will move into their active inventory.

2. The receiving entity has the correct product packages at their facility, but the incorrect quantity amounts.
   a. Corrective Action – Prior to the receipt of the transfer, the receiving entity can determine if they would like to take custody of the difference in quantity. If they determine that they will not take custody of the difference in quantity, then the entire package needs to be rejected on the transfer. Please note that if there are multiple packages on a transfer and one is incorrect, the licensee can reject the single package while receiving the rest into their active inventory. If the receiving licensee determines they will take custody of the incorrect quantity package, they will need to correct the package quantity before any further actions are done to that package.

3. The shipping entity has incorrectly designated the destination licensee for a transfer.
   a. Corrective Action – Edit the manifest and update the destination license.

4. The product packages were shipped with incorrect labels to a Provisioning Center.
   a. Corrective Action – It is best practice to not receive any package with incorrect labeling, that could affect patient safety and recalls. If the labeling is incorrect, the receiving licensee can reject the specific package or entire transfer at their discretion.
Metrc – Industry Training

Metrc provides industry training and education workshops in person and online, as well as training guides and videos available online.

- Register for classes online at: [https://www.metrc.com/michigan](https://www.metrc.com/michigan)
- We recommend that all industry users take classes every 3-4 months to stay updated on new features or changes.

**Online classes available:**
- Metrc New Business (Level 1) – All Facilities
- Metrc Advanced Cultivator – All Cultivator License Types
- Metrc Advanced Processor – All Processor Licensees
- Metrc Advanced Provisioning Center – All Provisioning Center Licensees
Metrc – Industry Support

Metrc provides live interactive support for industry users and licensees. Support contact information can be found on our website, when logged into Metrc under your Support tab, and is listed below.

Check under the “Support” tab for additional resources.

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