**Per the request of the BMR, Metrc is reposting Bulletin #2 for all licensees to review. At this time, there have been five (5) bulletins released. If you have missed any of them, please email into support@metrc.com for a copy.**

Greetings Metrc Users,

The BMR and Metrc would like to remind all licensees of the great importance of correctly entering information for items and patient registry card numbers for accurately capturing the effect of a patient sale on that patient’s daily and monthly (30 Day) purchasing limits. Previous guidance from the BMR Advisory Bulletin on this matter can be found here.

This bulletin will provide guidance and examples of proper entries for items and patient sales, as well as corrective action steps in the event incorrect information has been entered.

The corrective action steps outlined here must be followed any time incorrect item or patient sales information has been discovered to ensure accurate reporting in the system.

**Guidance on Creating Items**

In Metrc, licensees will be creating many different items to meet the needs of their business. All facilities need to be aware of how creating items in Metrc affects patient purchasing limits. Per the BMR, a sale or transfer of marijuana product to a registered qualifying patient or registered primary caregiver may not exceed the daily purchasing limit of 2.5 ounces per day per registered qualifying patient. A sale or transfer of marijuana product to a registered qualifying patient - either directly or through the qualifying patient’s registered primary caregiver - may not exceed the monthly (30 Day) purchasing limit of 10 ounces per month per registered qualifying patient.

In order to successfully capture the effect of a Sale on these limits, it is essential that the Grower and Processor facilities correctly create items in Metrc. Please see the example on the following page.
If a Processor is making brownies for transfer to a Provisioning Center that weigh four (4) ounces per brownie and plans for those brownies to be sold as single units, the item created by the Processor should match the image below.

Some additional points: A Metrc package tag will be assigned to the entire production batch of brownies in which the weight and cannabinoid profile are the same for all brownies. If a Processor makes a production batch of fifty brownies, only one Metrc package tag would be associated with that production batch. The Processor will then repackage the brownies out of the final production batch for transfer and sale. For a Provisioning Center, the sale of one brownie out of the transfer package they receive would deduct from that package tag by 1 Each and affect the patient’s limit by the equivalency of marijuana for infused product types: meaning that one four (4) ounce brownie would equate to a quarter (.25) of an ounce deduction off the patient’s daily purchasing limit.
If the Processor decides that to offer a five-pack of the same brownies instead of an individual brownie, a new item would need to be created. The screenshot below shows how this new item would look in Metrc. Notice that the unit weight now accounts for the unit weight of the five (5) x four (4) = 20 ounces for the brownies. This will ensure that the sale of each five-pack from the associated transfer package at a Provisioning Center will accurately reduce the patient’s limit.

**Formula: 4 Ounces per Brownie * 5 Brownies in Pack = 20 Ounce Unit Weight**

![Add Items](image)

If a Processor plans to sell brownies with different weight amounts, which will directly affect patient limits, they will need to make multiple items. The image below shows another item of brownies that would need to be created if a Processor decided to sell a six (6) ounce brownie instead of the previous four (4) ounce brownie in the first example. Although it is still a brownie at the same Processor facility, the different weight for that brownie will need to be properly captured.
Provisioning Centers & Patients

Provisioning Centers should always be checking to verify that the information that is being sent through their POS system is correct in Metrc.

Below are examples of **incorrect** information being entered for *Patient Sales*

**No Dash (–) Entered in Patient Registry Card Number**

All patient registry card numbers in the State of Michigan have a – in their number. Old numbers have a – after the first six numbers for their card. New numbers have a – after the PT designation, then another – after the 2-digit year.

**Date**

A date should never be entered and submitted within the Patient field.

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Caregiver ID

Caregiver ID card numbers need to be designated within the Caregiver field, never within the Patient field.

The proper format for a Patient ID will always start with the letter “P”. Proper format for an older Caregiver ID will always start with the letter “C”. New Caregiver IDs will always start with the letters “CG.”

Minor Patient ID

Minor patient sales should always be entered as a caregiver sale, as minor patients cannot purchase product on their own. Meaning every Minor patient must have a caregiver ID entered along with the Minor patient ID number. Minor patient registry card numbers are a new feature. They start with “MNR” and have dashes, just like the new patient and caregiver numbers. Old minor patient numbers look just like the old patient numbers.

Examples of properly formatted Patient numbers:

P234150-190115
P129932-011241
PT-18-012345
PT-18-678910

Examples of properly formatted Caregiver numbers:

C123456-654321
C012345-543210
CG-18-012345

Examples of properly formatted Minor Patient numbers:

MNR-18-012345
MNR-18-000123
• Letters, numbers, or symbols not contained within the Patient or Caregiver ID number should not be entered.

• A Patient or Caregiver ID number never contains the letter “O”.

• The dashes between letter/number groups must always be included.

Steps for Provisioning Center to Reconcile Patient Information

If a Provisioning Center discovers that an existing sales transaction requires reconciliation due to an incorrect patient registry card number, an employee of that Provisioning Center should edit the Sales Receipt. Additionally, notify BMR Enforcement at LARA-BMR-Enforcement@michigan.gov providing the METRC trouble ticket number in the email.

The Provisioning Center shall maintain an audit trail and supporting documentation for all Sales Receipt edits to be available in the event a State inspector requests them. 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

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

![Image of the Metrc interface showing the Edit Receipts button highlighted.]

Step 5: Make the necessary edits to the sales receipts, then select “Update Sales Receipts” button

![Image of the Metrc interface showing the Record Sales Receipts button highlighted.]

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)
Reminder for Integrators

When doing a POST /sales/v1/receipts the Sales Customer Type should be “Patient” or “Caregiver”. The Patient Registry Card Number that is entered at the point of sale will directly affect that patient’s limits, so it is imperative that this is correct. The Patient Registry Card Number must be entered for both Patient and Caregiver sales transactions. A Caregiver ID Card Number is only required to be entered when the Caregiver customer type is designated.

Example of a Patient Sale:

"SalesDateTime": "2016-10-04T16:44:53.000",
  "SalesCustomerType": "Patient",
  "PatientLicenseNumber": "P123456-789012",
  "CaregiverLicenseNumber": null,
  "IdentificationMethod": null,
  "Transactions": [
    {
      "PackageLabel": "ABCDEF012345670000010331",
      "Quantity": 1.0,
      "UnitOfMeasure": "Ounces",
      "TotalAmount": 9.99
    },
    {
      "PackageLabel": "ABCDEF012345670000010332",
      "Quantity": 1.0,
      "UnitOfMeasure": "Ounces",
      "TotalAmount": 9.99
    }
  ]

Example of a Caregiver Sale:
"SalesDateTime": "2016-10-04T16:44:53.000",
"SalesCustomerType": "Caregiver",
"PatientLicenseNumber": "P123456-789012",
"CaregiverLicenseNumber": "C123456-789012",
"IdentificationMethod": null,
"Transactions": [
{
  "PackageLabel": "ABCDEF012345670000010331",
  "Quantity": 1.0,
  "UnitOfMeasure": "Ounces",
  "TotalAmount": 9.99
},
{
  "PackageLabel": "ABCDEF012345670000010332",
  "Quantity": 1.0,
  "UnitOfMeasure": "Ounces",
  "TotalAmount": 9.99
}

**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 Grower – All Grower Facilities
- Metrc Advanced Processor – All Processor Facilities
- Metrc Advanced Provisioning Center – All Provisioning Center Facilities

**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 be advised that the new CSV Formatting Guide and Industry Reports Guide are now located under the Support Tab when you log in to Metrc.

Please feel free to email support@metrc.com or call 877-566-6506 with any questions or to request a copy of previous industry bulletins.