



## Module 4

A Day in the Life of a Dispensary Attendant

By Spencer Belz

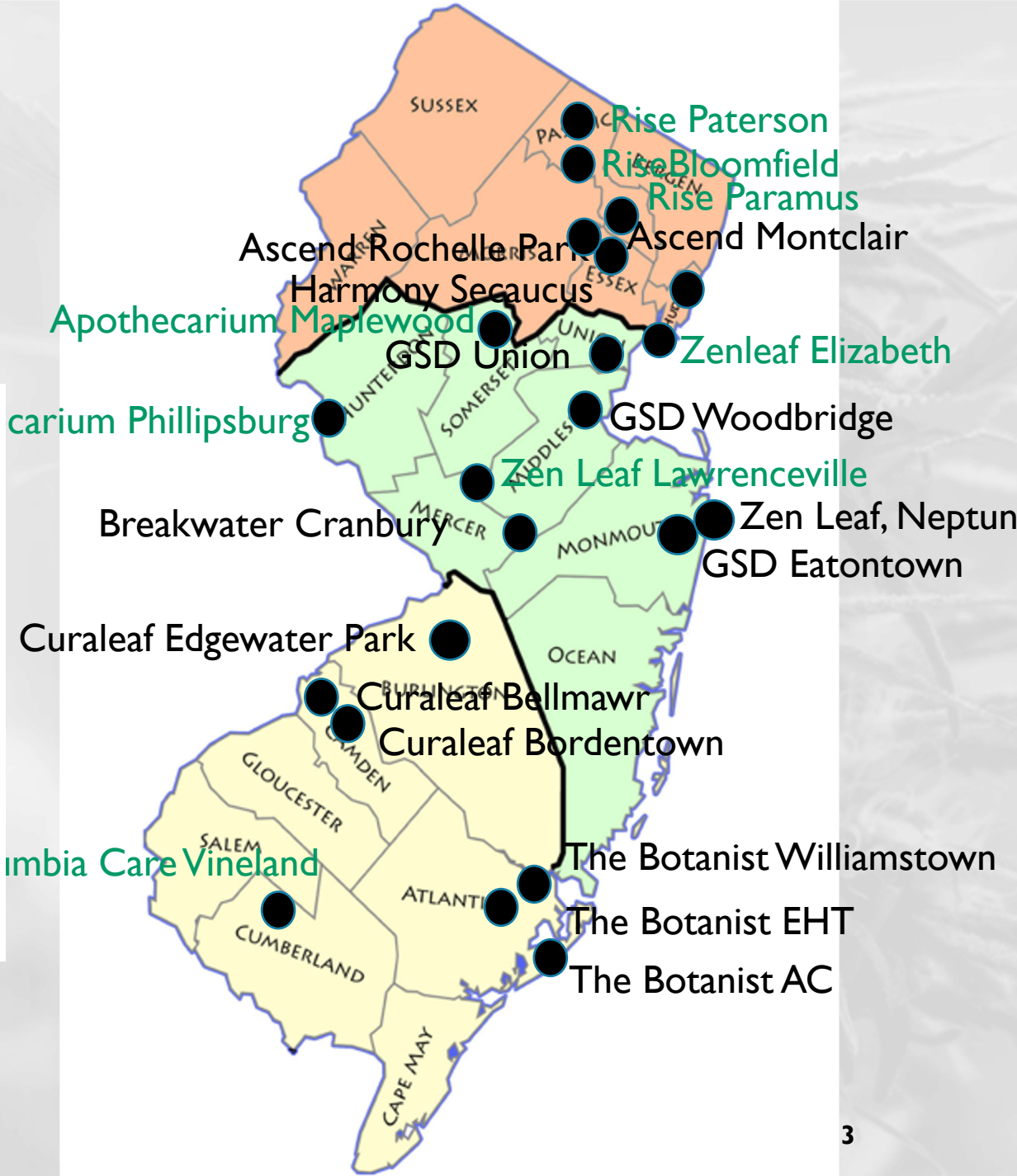
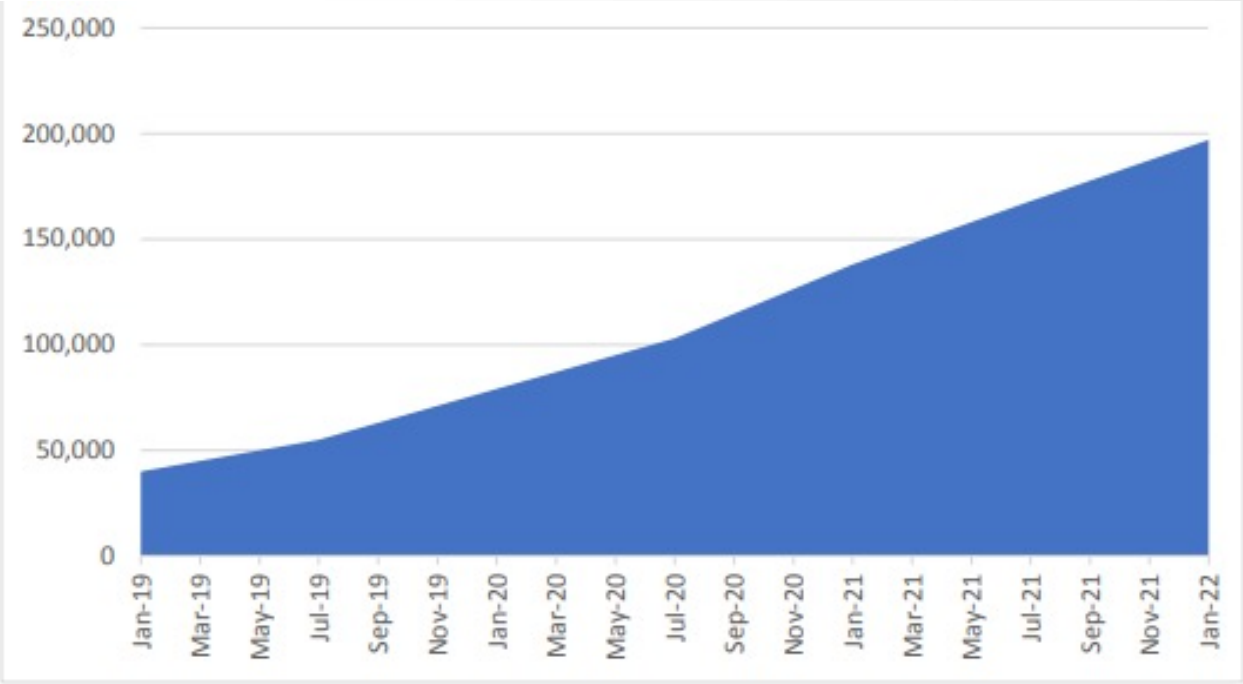
# Spencer Belz



- “A Day in the Life”
- Tracking product and cash
- Allotment
- NJMMP Portal and POS



# Program Growth



# Patient Demographics Snapshot

Age	% of Total
17 and Under	0.25%
18 - 21	3.37%
22 - 29	15.27%
30 - 39	24.87%
40 - 49	22.56%
50 - 59	16.06%
60 - 69	13.13%
70 - 79	4.02%
80 and Over	0.47%

**Youngest Patient: 5**  
**Oldest Patient: 95**

Gender	% of Total
FEMALE	43.79%
MALE	56.21%

Discount	% of Total
State Approved	18.39%
CCF Approved	52.12%
None	29.48%

# Dispensary Employee Demographics Snapshot

Staff Age	% of Total
21 - 24	6.45%
25 - 29	32.26%
30 - 34	32.26%
35 - 39	16.13%
40 +	12.9%

Years Working in Program	% of Total
Less than 1	19.35%
1 - 2	29.03%
2 - 3	16.13%
3 - 4	19.35%
4 - 5	6.45%
5 +	9.68%

Gender	% of Total
Female	45.16%
Male	45.84%

**Youngest Attendant: 22**  
**Oldest Attendant: 63**

# As with all industries and companies every dispensary and facility will be unique.

## Dispensary Attendant

- Receptionist
- Associate
- Counselors
- Technician or Patient Support Consultant

## Specialized Roles

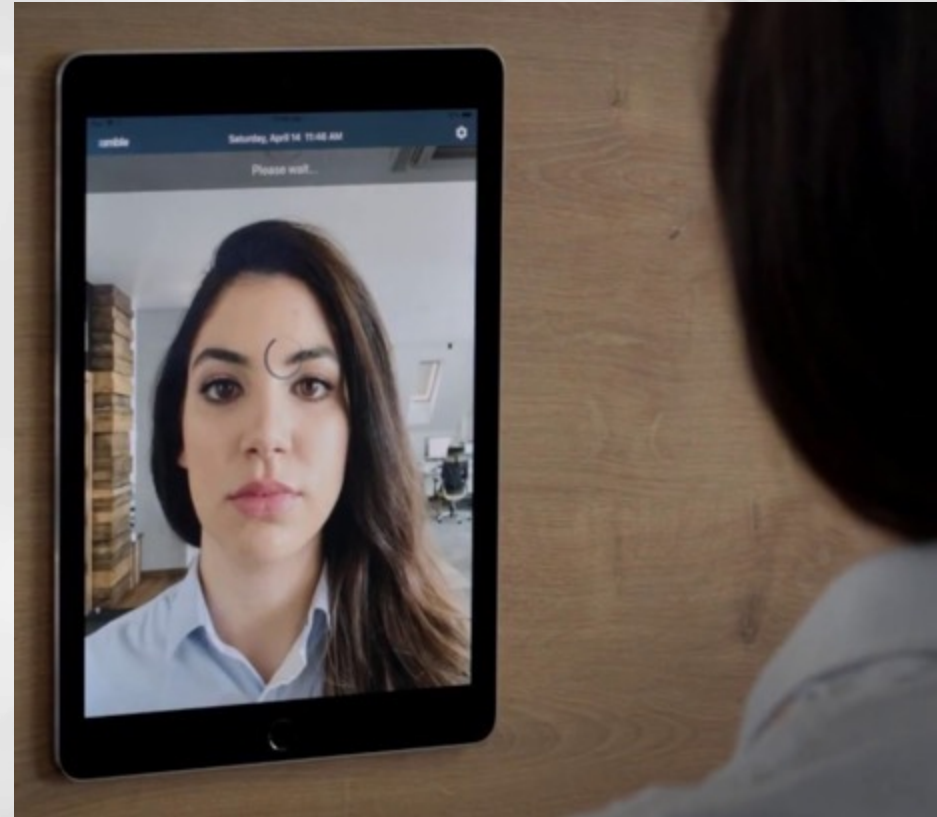
- Cultivation
- Inventory
- Purchasing
- Packaging & Labeling
- Sanitation
- Security
- Cash Manager
- Outreach
- Pharmacist

## Manager, Director

- Shift Supervisor
- Store Manager
- Operational Manager
- Corporate Officers/Director

# Working in a Dispensary: *Clock in to Clock out*

- Check and return phone messages
- Confirm new patient appointments
- Post available menu to social media
- Count register
- Clean & Sanitize
- Check and return phone messages
- Count and help put inventory away
- Reconcile daily transactions
- Clean



Facial Recognition Clock-In



# Dispensary Receptionist & Attendant

- Answering Phones and Checking Messages
- Greeting Patients
- Returning & New Patients
- Preparing patients registrations and renewals
- Checking Recommendations and Switching ATCs
- Scheduling Appointments and Creating Profiles
- **Performing Transactions**
- **Handling Cash and Checks**
- **Recommending Products**
- **Exchanges, Returns, and Credits**
- **Canceling Transactions**
- **Daily MMP Inventory**
- **Reconciling End of Day Transaction Reports**



***Comply with State Laws and NJMMP Regulations***



# Dispensary Counselor

- Conduct New Patient Orientations
- Provide continued counseling for returning patients
- Describe cultivars, cannabinoids and their different effects
- Ensure positive patient experience and instill confidence
- Comprehensive knowledge of cannabis products
- Update and maintain patient records within seed-to-sale software
- Maintain inventory tracking procedures and seed-to-sale tracking software



# Supervisors & Managers

- Typically Salary Position
- Scheduled Shifts
- Open and Close Building
- Record inventory
- Reconcile discrepancies
- Manage staff schedules
- Perform cash drops; create deposits
- Maintain and order supplies
- Handle patient disputes
- Responsible for several daily and monthly reports



# Directors and Officers

- Salary Position
- Always On Call
- Respond to emergencies
- Coordinate with governing authorities;
  - NJMMP
  - OSHA
  - Township, State, Municipal
- Growth of facilities and operations
- Communicate with press and media
- Projections, forecasts, reporting





# Learn the Specifics of your ATC

- Standard Operating Procedures
- Security
- Tracking: Registry and Point of Sale
- Compliance
- PPE, sanitation/safety/security protocols
- HIPAA
- NJ MMP Rules & Regulations

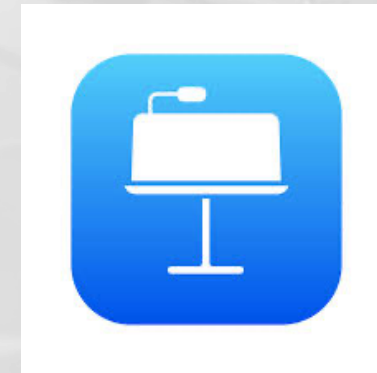
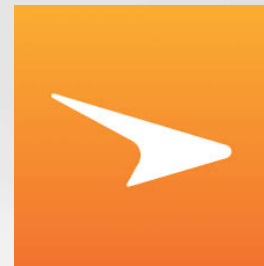


# Standard Operating Procedures

- Daily Inventory
- Transactions
- Handling Cash and Checks
- New Patient Intake and Orientation
- Scheduling New Patients
- Visitor Sign-In
- Exchanges, Returns, Credits
- POS Black Out
- Security

## *Tracking Product and Patient Allotment*

- ▶ Patient Allotments
- ▶ Entering purchases into MMP Registry



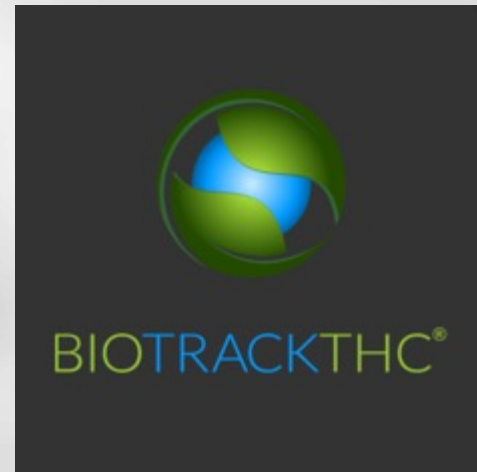


# Software, POS, Tracking, Compliance



**LeafLogix**  
SEED-TO-SALE CANNABIS ERP

**deacom<sup>®</sup>**



# Compliance



- How to guarantee compliance with Business SOP's
- State Regulations
- Audits



# Dispensary Daily Compliance – Inventory & Allotments

	B	C	D	E	F	G	H	I	J
1	Product	CART	CAGE	BIN	AC	WHOLESALE	BIOTRACK QTY	DISCREPANCY	
137	PINE TAR -BUD - 7g							0	
138	PINE TAR -SHAKE - 3.5g							0	
139	PINE TAR -SHAKE - 7g							0	
140	PINE TAR - PRE ROLLS - 3.5g							0	
141	ROBOT GIRL -BUD - 3.5g							0	
142	ROBOT GIRL -BUD - 7g							0	
143	ROBOT GIRL - SHAKE - 3.5g							0	
144	ROBOT GIRL -SHAKE - 7g							0	
145	ROBOT GIRL - PRE ROLLS - 3.5g							0	
146	SOPHORA -BUD - 3.5g							0	
147	SOPHORA -BUD - 7g							0	
148	SOPHORA -SHAKE - 3.5g							0	
149	SOPHORA -SHAKE - 7g							0	
150	SOPHORA - PRE ROLLS - 3.5g							0	
151	SOUR BANANA SHERBET - BUD - 3.5g							0	
152	SOUR BANANA SHERBET - BUD - 7g							0	
153	SOUR BANANA SHERBET - SHAKE - 3.5							0	
154	SOUR BANANA SHERBET - SHAKE - 7g							0	
155	SOUR BANANA SHERBET-PRE ROLLS 3.5g							0	
156	STRAWBERRY FIELDS - BUD - 3.5g							0	
157	STRAWBERRY FIELDS - BUD - 7g							0	
158	STRAWBERRY FIELDS - SHAKE - 3.5g							0	
159	STRAWBERRY FIELDS - SHAKE - 7g							0	
160	STRAWBERRY FIELDS - PRE ROLL - 3.5g							0	
161	SUPER SILVER HAZE - BUD - 3.5g							0	
162	SUPER SILVER HAZE - BUD - 7g							0	
163	SUPER SILVER HAZE - SHAKE - 3.5g							0	
164	SUPER SILVER HAZE - SHAKE - 7g							0	
165	SUPER SILVER HAZE - PRE ROLLS - 3.5g							0	
166	TAFFIE - BUD - 3.5g							0	
167	TAFFIE - BUD - 7g							0	
168	TAFFIE - SHAKE - 3.5g							0	
169	TAFFIE - SHAKE - 7g							0	
170	TANGIE - BUD - 3.5g							0	
171	TANGIE - BUD - 7g							0	
172	TANGIE - SHAKE - 3.5g							0	
173	TANGIE - SHAKE - 7g							0	

5/21/2020		BioTrack		Page# 1	
		End of Day Transaction Report			
Row Labels	-1	Patient Name	Sum of Grams		
= 5/19/2020 8:59		Thom	10.5		
= 5/19/2020 9:04		Man	28		
= 5/19/2020 9:05		Donn	21		
= 5/19/2020 9:08		Dian	14		
= 5/19/2020 9:10		Chlo	17.5		
= 5/19/2020 9:11		RICH			
= 5/19/2020 9:14		Mich			
= 5/19/2020 9:15		Tam			
= 5/19/2020 9:22		Scott			
= 5/19/2020 9:23		Bren			
= 5/19/2020 9:25		Mark			
= 5/19/2020 9:33		Jose			
		Alex			
		Dwa			
= 5/19/2020 9:40		Denn			
		Dea			
= 5/19/2020 9:41		Robe			
= 5/19/2020 9:44		Scott			
= 5/19/2020 9:47		Eric			
= 5/19/2020 9:48		Andr			
= 5/19/2020 9:49		Chris			
= 5/19/2020 9:56		Kath			
= 5/19/2020 9:57		John			

5/21/2020		DOH NJMMP			
		End of Day Transaction Report			
Row Labels	-1	Registry Id	Patient Name	Purchased Am	
= 12:00:00 AM				0	
= 8:59:13 AM			THOMAS		
= 9:04:21 AM			MANITRA		
= 9:05:54 AM			INA		
= 9:08:05 AM			ANE		
= 9:10:04 AM			CHLOE		
= 9:11:50 AM			CHARD		
= 9:15:11 AM			MICHAEL		
= 9:15:42 AM			TAMMY		
= 9:22:19 AM			SCOTT		
= 9:23:43 AM			ENDA		
= 9:25:59 AM			, MARK		
= 9:32:49 AM			SKI, JOSEPH		
= 9:33:12 AM			EXANDRIA		

From:	Joseph A
To:	Frederick F
Cc:	Cady Riley; Tim Weigand; John;
	Melissa
Subject:	Overage 4/7/20 The Botanist EHT
Date:	Tuesday, April 7, 2020 7:19:32 PM

4/7/20 The Botanist by CCF EHT

Heather [REDACTED]

1 [REDACTED] p

Purchased 3/4

Entered for an 1oz and 1/4

Thank You.

Joe A [REDACTED]



# Dispensary Compliance – Monthly & Quarterly Reports

MMJ Inventory as of								
	Plants	Packaged Product			Bulk Product			
		Flower	Shake/Trim	Extracted	Flower	Shake	Extracted	Other*
Breakwater ATC (Cranbury)								
Compassionate Care Foundation (Egg Harbor Twp)								
Columbia Care (Vineland)								
Curaleaf (Beltsmawr)								
Garden State Dispensary (Woodbridge)								
Greenleaf Compassion Center (Montclair)								
Harmony Foundation (Secaucus)								
GTI (Paterson)								
MPX (Pleasantville)								
TentAscend Boonton)								
Verano (Branchburg)								
Total/Total Weight (lbs)	0	0	0	0	0	0	0	0
Total		0		0				
Total Statewide			0					

\* BW in-house testing, pre-extraction, phenotype samples

## Monthly Inventory Reports

A	B	C	D	E	F	G	H	I	J	K
Day Time	Patient Name	Patient ID Number	Usable	Sale Employee	Item	Type	Item Quantity	Inventory ID	Usable	CCF Batch Number
4/1/2020 9:06	Kari		7	AM	CHM 4 OG	BLD	1	3738 9093 6030 1471	7	MAP 1756
4/1/2020 9:06	Kari		3.5	AM	COOKIES AND CREAM	BLD	1	7438 1790 7386 4821	3.5	3027
4/1/2020 9:06	Kari		3.5	AM	CITRUS SAP	BLD	1	1272 2527 9522 4321	3.5	1704
4/1/2020 9:10	Mitch		3.5	SR	CHM 4 OG	BLD	1	9100 8196 5552 9161	3.5	1799
4/1/2020 9:10	Mitch		3.5	SR	CHM 4 OG	BLD	1	4512 5710 2127 3581	3.5	1750
4/1/2020 9:10	Mitch		3.5	SR	COOKIES AND CREAM	BLD	1	3865 2853 3786 4731	3.5	3027
4/1/2020 9:10	Mitch		3.5	SR	JACK 22	BLD	1	8093 8864 2913 9901	3.5	1714
4/1/2020 9:10	Mitch		3.5	SR	JACK HERER	BLD	1	3318 9502 9475 5281	3.5	1893
4/1/2020 9:10	Mitch		3.5	SR	JACK HERER	BLD				
4/1/2020 9:10	Mitch		3.5	SR	KUNG LAD	BLD				
4/1/2020 9:10	Mitch		3.5	SR	ROBOT 361L	BLD				
4/1/2020 9:10	Mitch		3.5	SR	ROBOT 361L	BLD				
4/1/2020 9:16	Ali		7	AM	BOY DULUX	SHAKE				
4/1/2020 9:16	Quinn		3.5	SR	PACIFY KUSH	BLD				
4/1/2020 9:16	Quinn		3.5	SR	GREEN CHM	SHAKE				
4/1/2020 9:16	Quinn		3.5	SR	JERSEY BLUE	SHAKE				
4/1/2020 9:16	Quinn		3.5	SR	JERSEY BLUE	SHAKE				
4/1/2020 9:16	Quinn		3.5	SR	NIANGU	BLD				
4/1/2020 9:16	Ali		7	AM	COOKIES AND CREAM	BLD				
4/1/2020 9:16	Ali		3.5	AM	FIKE ALON ROMULAN	BLD				
4/1/2020 9:16	Ali		3.5	AM	JACK HERER	BLD				
4/1/2020 9:16	Ali		3.5	AM	JERSEY BLUE	Pre Roll				
4/1/2020 9:16	Ali		3.5	AM	THE PROPHET	BLD				
4/1/2020 9:21	Lari		7	SR	CHM 4 OG	BLD				
4/1/2020 9:21	Lari		7	SR	CHM 4 OG	BLD				
4/1/2020 9:21	Lari		7	SR	COOKIES AND CREAM	BLD				
4/1/2020 9:21	Lari		7	SR	COOKIES AND CREAM	BLD				
4/1/2020 9:23	Josee		7	AM	JACK 22	BLD				
4/1/2020 9:23	Josee		7	AM	CHM 4 OG	SHAKE				
4/1/2020 9:23	Josee		7	AM	GREEN CHM	SHAKE				
4/1/2020 9:23	Josee		7	AM	JACK 22	SHAKE				
4/1/2020 9:23	Josee		7	AM	JERSEY BLUE	SHAKE				
4/1/2020 9:26	Orin		3.5	SR	CHM 4 OG	BLD				
4/1/2020 9:29	Jess		3.5	SR	BOY DULUX	SHAKE				
4/1/2020 9:29	Jess		3.5	SR	NIANGU	BLD				
4/1/2020 9:31	Jar		7	SR	CHM 4 OG	SHAKE				
4/1/2020 9:31	Jar		7	SR	COOKIES AND CREAM	SHAKE				
4/1/2020 9:31	Jar		7	SR	JACK 22	SHAKE				
4/1/2020 9:31	Jar		7	SR	JACK 22	SHAKE				
4/1/2020 9:31	Jar		7	SR	JERSEY BLUE	SHAKE				
4/1/2020 9:31	Jar		7	SR	SEMON DA LUK	SHAKE				
4/1/2020 9:31	Jar		7	SR	SEMON DA LUK	SHAKE				
4/1/2020 9:31	Jar		7	SR	SOUR BANANA SHERBET	SHAKE				
4/1/2020 9:33	Josee		3.5	SR	JACK 22	BLD				
4/1/2020 9:33	Josee		3.5	SR	JERSEY BLUE	SHAKE				
4/1/2020 9:36	Miguel R		7	SR	JACK 22	BLD				
4/1/2020 9:36	Miguel R		7	SR	SOUR BANANA SHERBET	BLD				
4/1/2020 9:36	Rori		3.5	SR	CHM 4 OG	BLD				
4/1/2020 9:39	Rori		7	SR	SOUR BANANA SHERBET	SHAKE				
4/1/2020 9:39	Ta		7	AM	COOKIES AND CREAM	BLD				
4/1/2020 9:39	Ta		7	AM	JACK 22	BLD				
4/1/2020 9:39	Ta		7	AM	JACK HERER	BLD				
4/1/2020 9:39	Ta		7	AM	SOUR BANANA SHERBET	BLD				
4/1/2020 9:39	Ta		7	AM	TANGIE	BLD				
4/1/2020 9:39	Ta		3.5	AM	WHITE WIDOW	BLD				
4/1/2020 9:39	Ta		3.5	AM	WHITE WIDOW	BLD				
4/1/2020 9:39	Ta		7	AM	BUBBA TANG	BLD				

April 2020 Patient Sales Report

## Monthly Transaction Reports

## Quarterly Reports

SECURITY INSPECTION									
Compliance:									
	Yes	No	Re-occurring						
1.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Exterior security alarm system standards met	8:64-9.7				
2.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Interior security alarm system standards met	8:64-9.7				
3.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current security alarm system testing and maintenance records	8:64-9.7(k)				
4.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Security alarm system operational	8:64-9.7(k)				
5.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Security alarm back up system standards met	8:64-9.7(k)				
6.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Security alarm back up system operational	8:64-9.7(k)				
7.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Video surveillance system standards met	8:64-9.7(l)				

DISPENSARY PATIENT REQUIREMENTS INSPECTION									
Compliance:									
	Yes	No	Re-occurring						
1.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ATC patient and primary caregiver informational materials policy on file	8:64-11				
2.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ATC maintained and has available an adequate supply of informational materials pursuant to N.J.A.C. 8:64-11.1	8:64-11				
3.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ATC maintained a copy of the NJ MMP registry identification card and a NJ driver's license or state issued photographic identification of each qualifying patient and any primary caregiver	8:64-11				
4.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ATC maintained records of patient designation changes issued by the Department	8:64-11				
5.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ATC formulated a system for documenting a patient's self assessment of pain and/or primary qualifying symptoms using a pain rating scale	8:64-11				
6.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Patient's self assessment of pain documentation maintained by the ATC	8:64-11				

DISPENSARY INSPECTION									
Compliance:									
	Yes	No	Re-occurring						
1.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dispense medicinal marijuana only in the form authorized pursuant to N.J.A.C. 8:64-10.8(e) directly to patients and caregivers	8:64-11				
2.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sell marijuana with a consistent unit price and label without volume discounts	8:64-10				
3.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Authorized amount of usable marijuana in supply and consistent with actual demand ratios for the ATC	8:64-11				
4.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	During the first 60 days after commencement of operation an ATC is authorized to possess a reasonable supply of usable marijuana to build inventory	8:64-11				
5.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ATC adjustment of marijuana inventory within ten (10) days of a	8:64-11				

# Dispensary Compliance – Internal Tracking

[illegible]

## Sales VS Production – Sell Out Projections

[illegible]

Daily Operating Report





**Thank You!**