PRACTITIONER GUIDE TO PATIENT CERTIFICATION
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A. ISSUE A NEW CERTIFICATION

B. EDIT AN ACTIVE CERTIFICATION

C. EXTEND AN ACTIVE CERTIFICATION

D. CANCEL A CERTIFICATION

E. CERTIFICATION STATUS TABLE

F. REGISTRATION STATUS TABLE

G. MATRIX OF EDITABLE FIELDS

H. PRINT A CERTIFICATION

IT'S THE LAW: Practitioners must consult the PMP Registry to check a patient's controlled substance history before issuing or editing a patient's certification.
PMP Registry: https://commerce.health.state.ny.us/doh2/applinks/cspnp/

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Access the Medical Cannabis Data Management System (MCDMS)

First Time Users: Log into the Health Commerce System (HCS).
From My Content (top banner menu) → All Applications → "M" → Medical Cannabis Data Management System.
Click on the green plus sign. This will add the MCDMS application to your personal "My Applications" menu.
Click on the Medical Cannabis Data Management System link. Follow the prompts to access the system.

Returning Users: Log into the HCS.
From My Applications (left hand side menu), select Medical Cannabis DMS.

If you recently renewed your DEA registration, please allow 3 business days for the system to update.

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ⓘ **Important Information for Patients under 18 or Incapable of Consent**
If your patient is a under the age of 18 or incapable of providing consent for medical treatment, at the time of patient registration, this patient will require the following:
a. someone over 18 years old, with a valid DMV ID (driver license or non-driver ID card), to register the patient on the patient's behalf,
b. at least one designated caregiver who possesses a valid DMV ID (it can be the same person who's registering on behalf of the patient).

Questions? Contact us at: medical@ocm.ny.gov or 1-888-626-5151

A. ISSUE A NEW PATIENT CERTIFICATION

1. **Log into the MCDMS (Medical Cannabis Data Management System)**

2. **Select "Issue New Certification"**

3. **Perform Patient Search**

Search	
Search by ● Patient	○ ID
Last Name	Certification Number
	or
Date of Birth mm/dd/yyyy	Registry ID Card Number
	or
	NYS DMV ID
	Search

Searching for a patient whose name changed: Enter the "old" name in the search field. If this patient has not registered yet, you can change the name on the certification. If the patient did register, then the patient must request a new card via MCDMS.

4. **Search Results**
    - **No results:** If your search did not yield any results but you or another practitioner have certified this patient before – check for typos in your search fields.
      If the information you entered is correct, but the patient is still not found, scroll down and fill in the information on the Demographics, Medical and Dosing sections to complete a new patient certification.

    - **Active Certification(s) Results:**
      The active certification is issued by you: when possible make changes to this *existing active* certification rather than creating a new certification. Updating the existing certification may allow the patient to continue using an existing registry ID card and prevent gaps in access to medication.

      The active/expired/canceled certification is issued by another practitioner: select the result. Scroll down. The Demographics section will be pre-populated with the information from the certification you selected. You can change the information in this section as needed. Fill in the Medical and Dosing sections. Submit the certification to issue the patient a new certification. Please note, the patient must register on the new certification via MCDMS.

5. Demographics Section
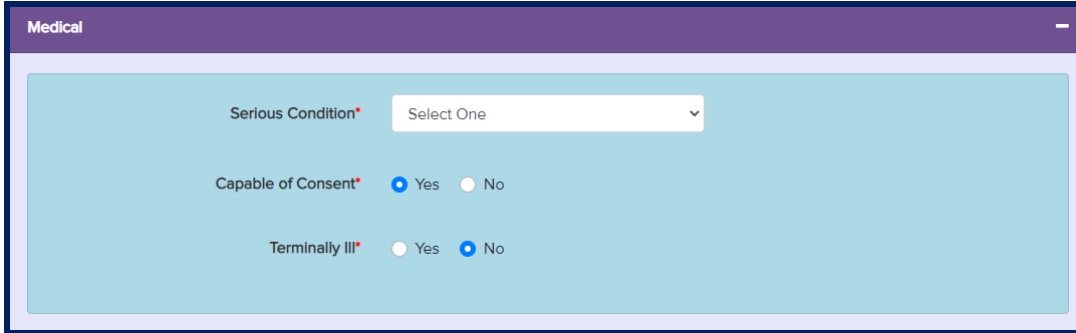
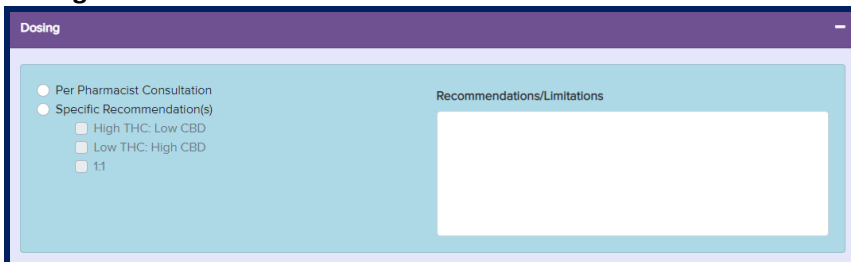- **First Name:** If your patient has a NYS DMV ID (Driver License, Driver Permit, or Non-Driver ID Card), enter the first name (and any spaces, characters, or hyphens) <u>exactly</u> as shown on the DMV ID, <u>excluding</u> the comma and any text, initials or characters that follow the comma.

- **Last Name:** If your patient has a NYS DMV ID (Driver License, Driver Permit, or Non-Driver ID Card), enter the last name <u>exactly</u> as shown on the DMV ID including any spaces, hyphens, or other special characters.

- **Date of Birth:** Enter the patient's date of birth. The application will calculate the patient's age to assist with identifying any typographical errors.

- **NYS DMV ID:** Enter the patient's NYS DMV ID, if known. The system will validate the NYS DMV ID when you submit the certification. If the validation fails, check the information entered. If the information appears to be correct but the validation still fails, remove the DMV ID and proceed without it. The patient will have an opportunity to resolve the issue at the time of registration.

- **Street Address:** Enter the patient's current New York State <u>street</u> (residence) address (permanent or temporary). Check if the patient has an apartment number. Do NOT use a PO Box for the patient's residence address. The patient will have an opportunity to enter a mailing address during the registration process. The mailing address must be within the New York State and cannot have a mail forwarding service. Cards that require forwarding services will be returned to the program and the patient will be required to update their address via a new card request.

- **Temporary living in New York State for medical treatment:** If the patient temporarily resides in New York State for care and treatment, select the checkbox.

6. **Medical Section**

- **Serious Condition:** Select the patient's primary serious condition from the dropdown.
  If "Opioid alternative for pain that degrades health and functional capability" is selected, you must also select the patient's "Underlying Condition" from the secondary dropdown menu.
  If "Other" is selected, you must manually enter the patient's "Other Qualifying Condition".

- **Capable of Consent:** If the patient is not capable of consenting to medical treatment, select "No".

- **Terminally Ill:** Select "Yes" if your patient is terminally ill. The MRTA defines "terminally ill" as an individual who has a medical prognosis that the individual's life expectancy is approximately one year or less if the illness runs its normal course.

7. **Dosing Section**

- **Dosing:** Make one selection: "Per Pharmacist Consultation" or "Specific Recommendations". "Per Pharmacist Consultation" can be used by practitioners who do not have specific dosing recommendations and wish to defer the selection of medical cannabis to the pharmacists practicing within registered organization dispensing facilities. If you select "Specific Recommendations", you must select at least one product ratio. If appropriate, you may select two or all specific recommendations.

- **Recommendations/Limitations:** This field is visible to the pharmacists at dispensing facilities. Use this space to enter any additional notes regarding the patient's dosing recommendations (i.e., no vaping or flower products; patient may home grow).

8. **Issue and Expiration Date**

Issue Date	07/15/2021
Expiration Date*	07/15/2022 📅

- **Issue Date:** System pre-fills the issue date with today's date.

- **Expiration Date:** The expiration date is tentatively pre-filled to one year from today. You may reset the expiration date to any date within a year of the certification issue date. If your patient is terminally ill <u>and</u> is a resident of New York State, you may remove the expiration date and leave the field blank. If your patient is terminally ill but is temporarily residing in New York State for medical treatment, the expiration date cannot exceed one year from today.

9. **Submit the Certification**

Attestation

By clicking "Submit", I attest to the following:
- *I have successfully completed an approved course on the Medical-Use of Cannabis;*
- *I am qualified to treat the patient's serious condition;*
- *The patient is under my continued care for the serious condition;*
- *In my opinion and review of past treatments, the patient is likely to receive therapeutic or palliative benefit from the primary or adjunctive treatment with*

Clear   Submit

- Review the patient information you entered on the certification. If you notice major discrepancies and wish to start over, click the "Clear" button.

- Read and review the attestation in its entirety. Click the "Submit" button.

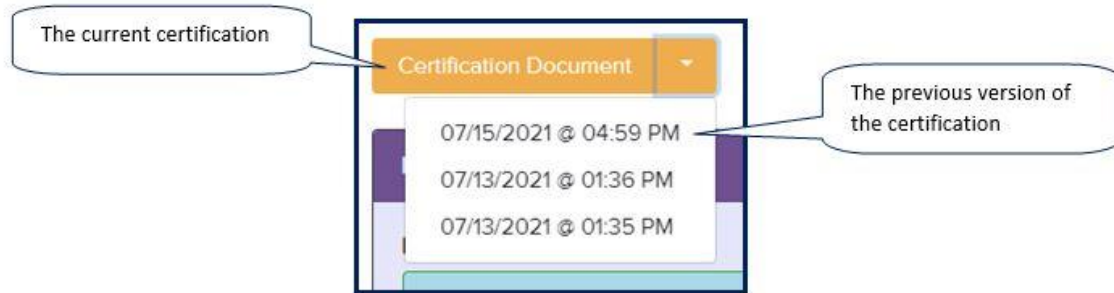- The Certification # is automatically generated by the system.

10. **Print the Certification**
    Once the certification is successfully submitted, the system will automatically open a printable certification form (in .pdf format). Depending on the browser, you may need to take different steps to print the certification.

    ❗ Make sure you print the entire document and not the first page only. The pages that follow the certification document provide important instructions to the patient on how to register.

    To print or re-print any given certification, return to the home page and search for the certification. Click on the row with the identified certification. Click on the "Certification Document" button.

Office of Cannabis Management
Medical Cannabis Program

💡 *Tip: Clicking on the "Certification Document" button itself (not a dropdown) will print <u>the most recent</u> certification. The previous versions will be displayed in the drop-down menu. To clarify, if you click on the first date in the dropdown menu, you will open a printable form of the certification that was issued <u>prior to the current version</u>.*

11. Check the Printed Certification for Errors

If you find an error on the certification or realized you need to make changes, do NOT create a new certification. You can edit most fields as long as the patient did not register on the certification. Return to the home page, navigate to the certification in question and select the "Edit" button. Edit the certification as needed.

If the patient did register on the certification, select the "Edit" button to determine what fields are editable. If the fields you need to edit are read-only, instruct the patient to request a new card.

There are only 2 scenarios that require a new certification when a patient's registration is in progress: error in DOB or Capable of Consent selection (see Exceptions).

B. EDIT AN ACTIVE CERTIFICATION

1. **Search for the patient certification on the home page.**

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2. **Select the row with the identified certification.**
You can only edit active certifications. The functional buttons for expired or canceled certifications will be grayed-out.

3. **Perform a patient check: ensure that the information on the screen matches the patient you are working on.**

   💡 *Tip: If you wish to see the historical data entries for a given patient certification, click the "Certification Document" drop-down menu to retrieve the previous versions of the certification.*

4. **Click the "Edit" button and edit the fields in the Demographics, Medical, and/or Dosing sections as needed.**
You may edit most fields as long as the patient had not started the registration. Once the patient registration is in progress, you will lose the ability to edit certain fields.
If you require edits beyond those that are available to you, please contact the patient. The patient can formally request a change in information on the card via the MCDMS portal.

   <p style="text-align:center">***Exception***</p>
The "DOB" field or the "Capable of Consent" selection cannot be edited after the patient registration has been initiated. The patient (also) cannot formally request this change. If a patient's date of birth or a "Capable of Consent" selection is incorrect on an existing certification, you must issue a brand-new certification. Please remember to cancel the certification that contans an error. The patient must register on a new certification.

5. **Issue and Expiration Dates**
   - **Issue Date:** System pre-fills the issue date with today's date.

   - **Expiration Date:** The expiration date is tentatively pre-filled to one year from today. You may reset the expiration date to any date within a year of the certification issue date. If your patient is terminally ill <u>and</u> is a resident of New York State, you may remove the expiration date and leave the field blank. If your patient is terminally ill but is temporarily residing in New York State for medical treatment, the expiration date cannot exceed one year from today.

6. **Submit the Certification**
   - Review the patient information you entered on the certification. If you notice major discrepancies and wish to start over, click the "Clear" button.

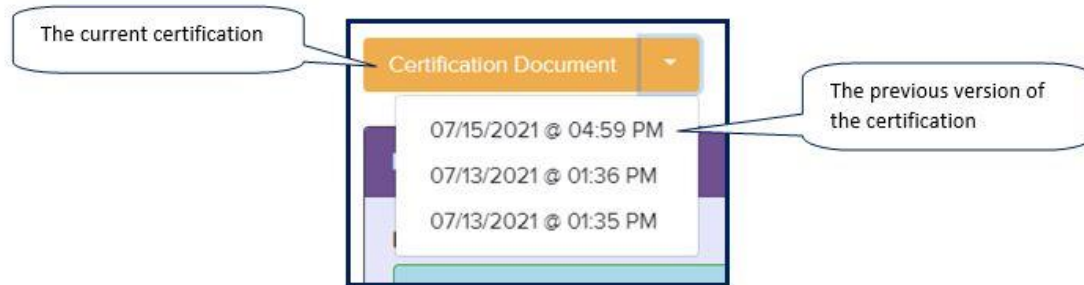   - Read and review the attestation in its entirety. Click the "Submit" button.

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Once the certification is submitted, the system will automatically open a printable certification form (in .pdf format). Depending on the browser, you may need to take different steps to print the certification.

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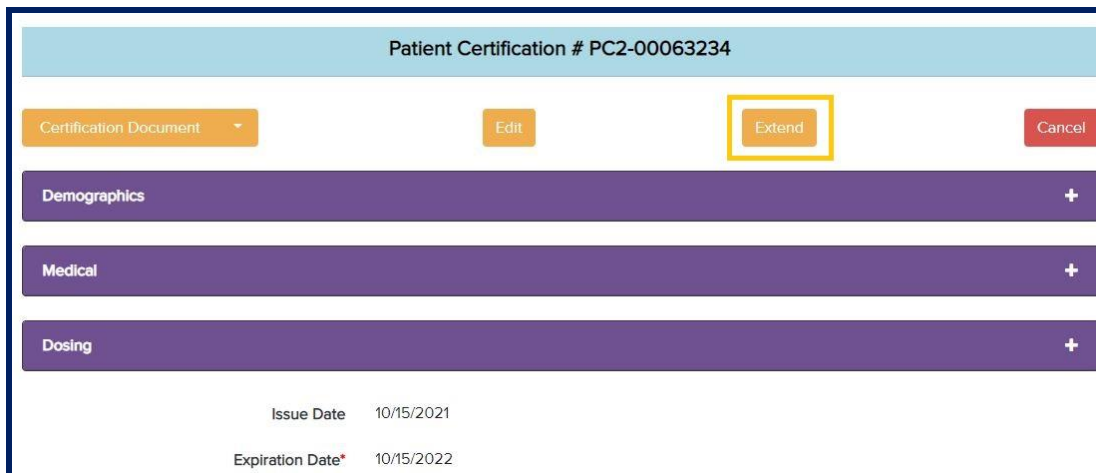

8. **Check the Printed Certification for Errors**
   If you find an error on the certification or realized you need to make changes, do NOT create a new certification. You can edit most fields as long as the patient did not register on the certification. Return to the home page, navigate to the certification in question and select the "Edit" button. Edit the certification as needed. If the patient did register, select the "Edit" button and check what fields are editable. If the fields are read-only, the patient should request a new card.
   There are only 2 scenarios that require a new certification when a patient's registration is in progress: error in DOB or Capable of Consent selection (see Exceptions).

C. EXTEND AN ACTIVE CERTIFICATION

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The "Extend" function should be used when a patient's certification expiration date needs to be extended, and no other information (demographic, medical or dosing) requires changes.

If a patient's certification needs to be extended and requires changes in one of the sections, use the "Edit" function instead.

1. **Search for the patient certification on the home page.**

2. **Select the row with the identified certification.**
   You can only extend active certifications. The functional buttons for expired or canceled certifications will be grayed-out.

3. **Perform a patient check: ensure that the information on the screen matches the patient you are working on.**

   💡 *Tip: If you wish to see the historical data entries for a given patient certification, click the "Certification Document" drop-down menu to retrieve the previous versions of the certification.*

4. **Click the "Extend" button.**
   - **Issue Date:** System will pre-fill the issue date with today's date.
   - **New Expiration Date:** The expiration date is tentatively pre-filled to one year from today. You may reset the expiration date to any date within a year of the certification issue date. If your patient is terminally ill and is a resident of New York State, you may remove the expiration date and leave the field blank. If your patient is terminally ill but is temporarily residing in New York State for medical treatment, the expiration date cannot exceed one year from today.

5. **Submit the Certification.**

6. **Print the Certification.**
   Once the certification is submitted, the system will automatically open a printable certification form (in .pdf format). Depending on the browser, you may need to take different steps to print the certification.

   ❗ Make sure you print the entire document and not the first page only. The pages that follow the certification document provide important instructions to the patient on how to proceed.

7. **Check the Printed Certification for Errors**
   If you find an error on the certification or realized you need to make changes, do NOT create a new certification. You can edit most fields as long as the patient did not register on the certification. Return to the home page, navigate to the certification in question and select the "Edit" button. Edit the certification as needed. If the patient did register, select the "Edit" button and check what fields are editable. If the fields are read-only, the patient should request a new card.

There are only 2 scenarios that require a new certification when a patient's registration is in progress: error in DOB or Capable of Consent selection (see Exceptions)

D. CANCEL A CERTIFICATION
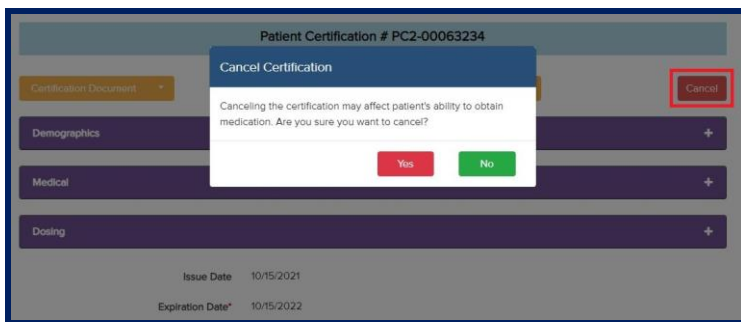
Only practitioners can cancel certifications. Practitioners can cancel only those certifications that are issued by them. If a patient cancels their registration, its respective certification remains active until it's canceled by the certifying practitioner or it reaches its expiration.

Canceling an active certification should be performed only when needed. Some valid scenarios for canceling an active certification include a patient who's no longer willing to participate or is no longer suitable for the program; or an error that cannot be reversed unless a new certification is issued (see Exceptions). Before canceling, first check if you, or the patient, or the call center help desk can correct the error.
In the majority of cases, the errors can be corrected by either editing an existing certification or requesting a new card.

1. **Search for the patient certification on the home page.**

2. **Select the row with the identified certification.**
   You can only cancel active certifications. The functional buttons for expired or canceled certifications will be grayed-out.

3. **Perform a patient check: ensure that the information on the screen matches the patient you are working on.**

4. **Click the "Cancel" button.**
   Once you confirm Yes to Cancel, the certification will be canceled immediately. Any associated patient and caregiver registrations and registry ID cards will become inactive.

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E. CERTIFICATION STATUS DEFINITIONS

Certification Status	Description
Active	The certification has been submitted. The patient can register.
Canceled	The certification was canceled by the practitioner. Any associated patient and caregiver registrations and registry ID cards are also canceled. You cannot renew a canceled certification. If a patient requires a continuation of medical care through the Medical Cannabis Program, a new certification must be issued.
Expired	The certification has reached its expiration date. Any associated patient and caregiver registrations and registry ID cards are also expired. You cannot modify an expired certification. If a patient requires a continuation of medical care through the Medical Cannabis Program, a new certification must be issued.

F. REGISTRATION STATUS DEFINITIONS

Registration Status	Description
Approved	The registration was approved by the Program. A temporary registry ID card is available to the patient to purchase medication and is valid for 30 days. The registry ID card has been issued to the patient and will arrive in the mail within 10 business days. *A new registry ID card will not be issued if the existing certification was extended without changes to the patient demographic information. The registration has been automatically extended until the new expiration date on the certification.
In Program Review	The registration has been submitted but requires Program review. The applicant cannot edit the registration while in this status.
Applicant Action Required	The Program has reviewed the registration and determined that additional information is required from the applicant. The registration can now be edited by the applicant and re-submitted to the program for further review and approval.
Canceled	The registration is canceled. This can be due to: practitioner canceling the associated certification, the patient canceling his/her own registration, or the Program canceling the registration.
Expired	The certification associated with this registration has expired. If applicant wishes to continue, he/she must obtain a new certification and register on the new certification.
Denied	The registration has been denied by the Program. The patient can start a new registration on the same or different certification.

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G. MATRIX OF EDITABLE FIELDS

Type of Change	Patient Registration Status	Do This:
Name	Not started	Edit Existing Certification
	In Program Review	Edit Existing Certification
	Applicant Action Required	Edit Existing Certification
	Approved	Ask patient to request a new card
DOB	Not started	Edit Existing Certification
	In Program Review	Issue New Certification; cancel the existing certification
	Applicant Action Required	Issue New Certification; cancel the existing certification
	Approved	Issue New Certification; cancel the existing certification
Email & Phone #	All statuses	Edit Existing Certification
Street Address	Not started	Edit Existing Certification
	In Program Review	Edit Existing Certification
	Applicant Action Required	Edit Existing Certification
	Approved	Ask patient to request a new card
Temporarily Residing in New York for medical treatment	Not started	Edit Existing Certification
	In Program Review	Edit Existing Certification
	Applicant Action Required	Edit Existing Certification
	Approved	Edit Existing Certification
Serious Condition Underlying Condition Other Qualifying Condition	Not started	Edit Existing Certification
	In Program Review	Edit Existing Certification
	Applicant Action Required	Edit Existing Certification
	Approved	Edit Existing Certification
Capable of Consent	Not started	Edit Existing Certification
	In Program Review	Issue New Certification; cancel the existing certification
	Applicant Action Required	Issue New Certification; cancel the existing certification
	Approved	Issue New Certification; cancel the existing certification
Terminally Ill	Not started	Edit Existing Certification
	In Program Review	Edit Existing Certification
	Applicant Action Required	Edit Existing Certification
	Approved	Edit Existing Certification
Dosing Recommendations	Not started	Edit Existing Certification
	In Program Review	Edit Existing Certification
	Applicant Action Required	Edit Existing Certification
	Approved	Edit Existing Certification
Expiration Date	Not started	Edit Existing Certification
	In Program Review	Edit Existing Certification
	Applicant Action Required	Edit Existing Certification
	Approved	Edit Existing Certification

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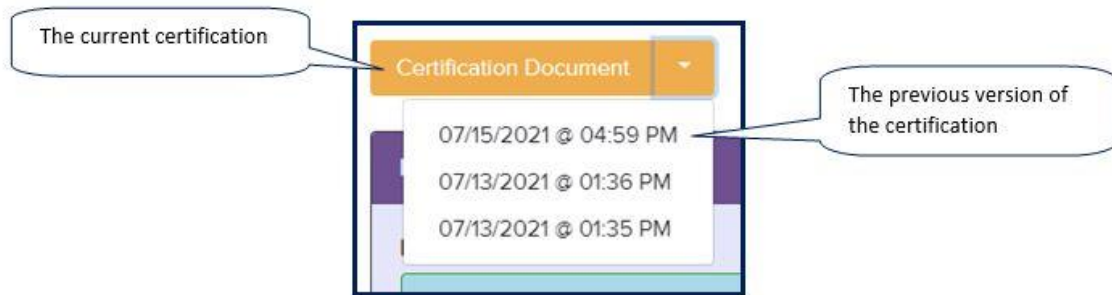
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   There are only 2 scenarios that require a new certification when a patient's registration is in progress: error in DOB or Capable of Consent selection (see Exceptions below).

   <p style="text-align:center">***Exception***</p>

   The "DOB" field or the "Capable of Consent" selection cannot be edited after the patient registration has been initiated. The patient (also) cannot formally request this change. If a patient's date of birth or a "Capable of Consent" selection is incorrect on an existing certification, you must issue a <u>brand-new certification</u>. Please remember to cancel the certification that contans an error.
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