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Bulletin Number: MO_IB_0005	Distribution Date: 10/29/20	Effective Date: 10/29/20			
Contact Point: Metrc® Support	Subject: Caregiver Lookup and Editing Incorrect Sales				
Reason: Updating users on the C sales entries.	aregiver lookup feature and prov	viding steps to edit incorrect			

Greetings Metrc Users,

The DHHS and Metrc are providing details within this bulletin regarding the Caregiver Status Lookup feature to support verifying active and inactive caregivers. Also, within this bulletin, steps have been provided to correct any sales receipts that were inaccurately reported with either an incorrect patient or caregiver number.

Please see the following pages for additional details below:



Caregiver Lookup

Users with the ability to conduct sales will need to ensure they are granted the appropriate permission by the Metrc admin, or an employee who can edit employee permissions at their facility. The caregiver lookup permission will be found within the "**Search Menu**" for **Dispensaries** only as shown in **Figure 1**.

Demaississes		
Permissions	Packages Page	
	Grids (reg'd)	✓ View
	Inventory	✓ Manage
	Create/Submit/Disc.	Manage
	Notes	Manage
	Transfers Menu	
	Licensed & External	Manage
	Templates	Manage
	Salos Monu	
	Salos	Manage
	Sales Sales Delivery	Manage
	Sales Delivery	Manage
	Patients Menu	
	Adverse Responses	🖂 Manage
	Financials Menu	
	All	🖂 Manage
	Reports Menu	
	All	✓ View
	Admin Menu	
	Tag Orders	🖂 Manage
	Tags	🖂 Manage
	Locations	🖂 Manage
	Strains	🖂 Manage
	Items	Manage
	Employees	Manage
	Search Menu	
	Patient Status Lookup	View
	Caregiver Status Lookup	View

Figure 1: Employee Permission for Caregiver Status Lookup

Once the permission is granted to a user, the caregiver status lookup will be the magnifying glass in the top right-hand side of the toolbar as shown in **Figure 2**.



Figure 2: Magnifying Glass for Caregiver Lookup

When selecting the magnifying glass, a Caregiver Status Lookup action window will open that will \tilde{M} etrc LLC, 2020 \tilde{P} a g e 2 \mid 6



be the same as the example below in **Figure 3 and 4**. The below examples outline what is currently expected when looking up both a valid and an invalid caregiver.

Caregiver Stat	tus Lookup				×				
Caregivers									
				A.	▼- = +				
Caregiver No.	:	Registration :	Status :	Start	Expires :				
Image 1 Image Image 20 rows per page Viewing 1 - 1 (1 total) Image Image									



Caregiver Status Lookup ×										
Caregivers	CAR100000	Look Up								
				ē.	Ţ. Ξ. +					
Caregiver No.	:	Registration	Status	Start	Expires :					
		2021-10-20	Active	10/20/2020	10/20/2021					
	Image Page 1 Image Image 20 Image Viewing 1 - 1 (1 total) Image Image									

Figure 4: Valid Caregiver Lookup Example

Key points about the caregiver lookup:

- Caregivers will be designated with a Valid/Inactive/Expired Registration Status. A sale **should never** occur to a Caregiver who does not have an "Active" status.
- Dispensaries **will not** be able to see the purchases or previous locations of the caregiver.
- Dispensaries should **always validate** the Patient card via the Patient Status Lookup for which the Caregiver is making a purchase for. This Patient card should show an active status and an available amount to purchase.
- Caregiver numbers must be **entered exactly as they appear** on their card and the sale **must be** recorded immediately upon purchase (Real-Time).



Incorrect Patient/Caregiver Numbers

Dispensary licensees are expected to verify with the Metrc system that the registered qualifying patient or a registered caregiver holds a valid, current, unexpired, and unrevoked registry identification card. The Metrc system validates only current, unexpired, and unrevoked patient and caregiver numbers that are identical to the numbers printed on the registry cards.

If a dispensary has entered a partial or incorrect patient or caregiver numbers into the Metrc system, corrective action must be taken. For corrective action, dispensaries 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 the correct format for Missouri patient and caregiver numbers below:

- Patients:
 - PAT000000
 - PAT101010
 - PAT020230
- Caregivers:
 - CAR000000
 - CAR020219
 - CAR340919

Dispensaries must also indicate if a caregiver is buying marijuana product for a patient. To do this, a dispensary must enter the patient number the caregiver is purchasing for as well as the caregiver's number. A dispensary should not enter a caregiver's number as the patient number into the Metrc system if the caregiver is purchasing for a patient.

If a Dispensary discovers that an existing sales transaction requires reconciliation <u>due to an</u> <u>incorrect patient or caregiver registry card number</u>, an employee of that Dispensary should *edit* the Sales Receipt. If you are using a third-party point of sale vendor, we encourage you to consult with them on the best practice for correcting any incorrect transactions. If they have any questions, please have them reach out to <u>api-info@metrc.com</u>.

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 error as shown in **Figure 5**.

Receipt :	Sales :	Customer Type	Patient (1	Caregiver	Packages	Total

Figure 5: Sales Receipt Columns



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 in **Figure 6** below.

† Sort Ascending	
↓ Sort Descending	Filter by:
🔣 Columns 🔹 🕨	Contains 🔹
▼ Filter ►	 PAT
	And 🔻
	Contains •
	Filter Clear

Figure 6: Columnar Sorting and Filtering

Step 4: Select the Patient that needs to be corrected and click the "Edit Receipts" button as seen in Figure 7.

R	Record Receipts Edit Receipts Finalize									
	Receipt	Sales	Customer Type	Patient :	Caregiver :	Packages :	Total :	Recorded	Finalized :	
•	000000131	10/20/2020 09:55 pm	Patient	CAR0000000		1	\$40.00	10/20/2020 09:55 pm	No	Void

Figure 7: Editing and Incorrect Receipt

Step 5: Make the necessary edits to the sales receipts as seen in Figure 8 below, then select "Update Sales Receipts" button as shown below in Figure 9.



Edit Receipts			×							
Sales Receipt # 1 (clear										
Receipt 0000000131	Q	Customer	PatientCaregiver							
Date/Time		Caregiver <u>No.</u> Patient <u>No.</u>	CAR0000000 PAT0000000							
Package #1 1A4FF010 Available 10 g	000012D00000090 Q	Clear) Quantity Total Price	5 Grams ~ \$ 40 ÷							
(package)										
Update	Sales Receipts Cancel									

Figure 8: Edit Receipts Action Window

	Record Receipts	E	dit Receipts Finaliz	ze						Ĺ	a. [7.] E	• •
Γ	Receipt	:	Sales :	Customer Type	Patient	:	Caregiver :	Packages :	Total :	Recorded	Finalized :	
	000000131		10/20/2020 09:55 pm	Caregiver	PAT0000000		CAR0000000	1	\$40.00	10/20/2020 09:55 pm	No	Void

Figure 9: Updated Sales Receipt

Please note that dispensaries need to designate the correct customer type for every dispensation. The two types of customers are explained below.

- Patient Missouri Patient Cardholder
 - o Requires the correct patient registry number
- Caregiver Missouri Caregiver Cardholder (must have a Missouri Patient Cardholder information when purchasing)
 - o Requires the correct caregiver registry number
 - Requires the correct patient registry number

Please contact Metrc Support via email at <u>support@metrc.com</u>, or by calling 877-566-6506 with any questions or concerns.