Metrc Support Bulletin

| **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 Caregiver lookup feature and providing steps to edit incorrect sales entries.		

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**.
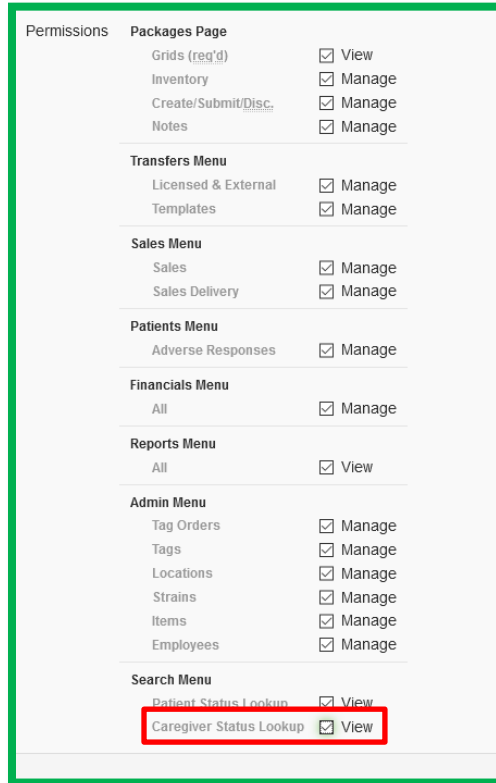
**Figure 1: Employee Permission for Caregiver Status Lookup**

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.**
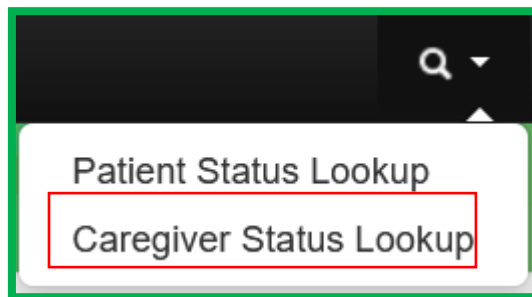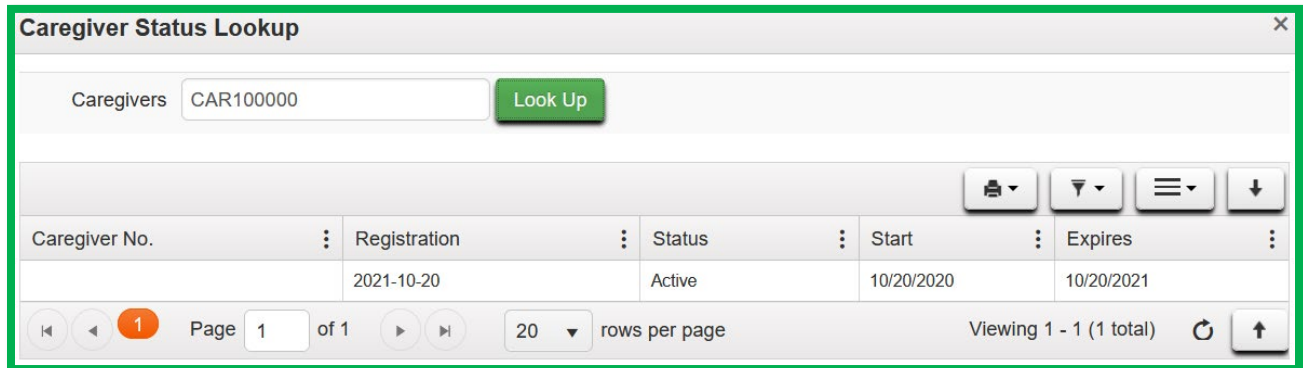

Figure 2: Magnifying Glass for Caregiver Lookup

When selecting the magnifying glass, a Caregiver Status Lookup action window will open that will

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.
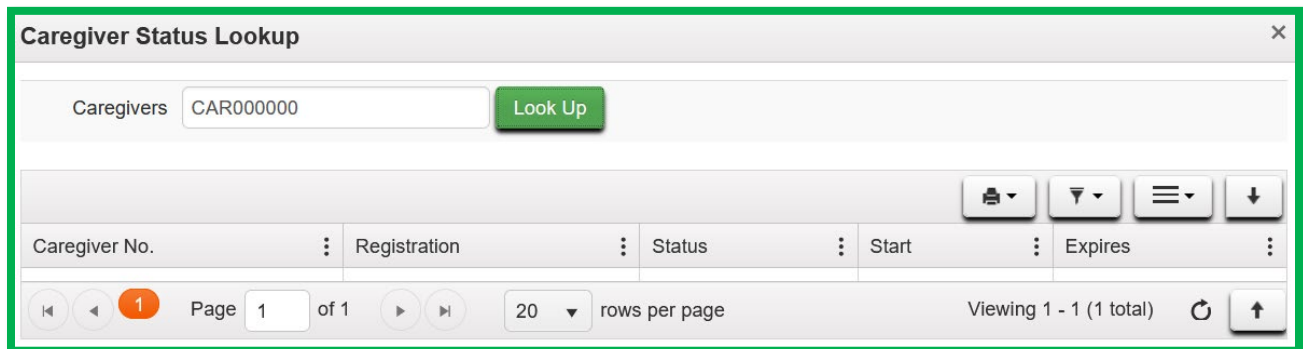
Figure 3: Invalid Caregiver Lookup Example

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).

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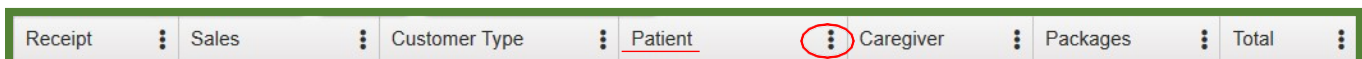
If a Dispensary discovers that an existing sales transaction requires reconciliation due to an incorrect patient or caregiver registry card number, an employee of that Dispensary should *edit* the Sales Receipt. If you are using a third-party point of sale vendor, we encourage you to consult with them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

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**.
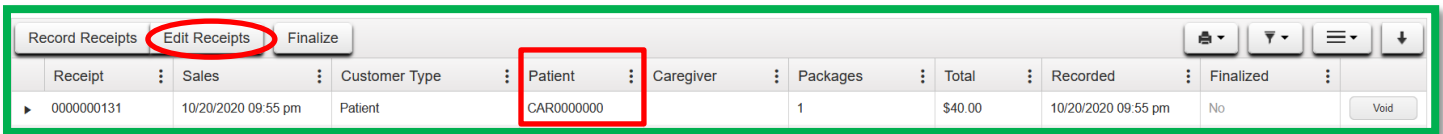

Figure 5: Sales Receipt Columns

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.
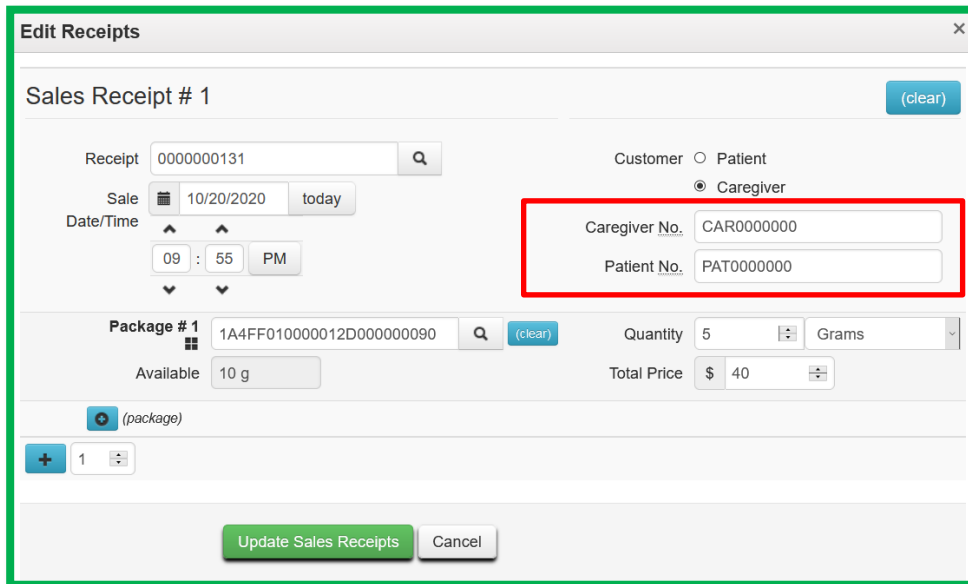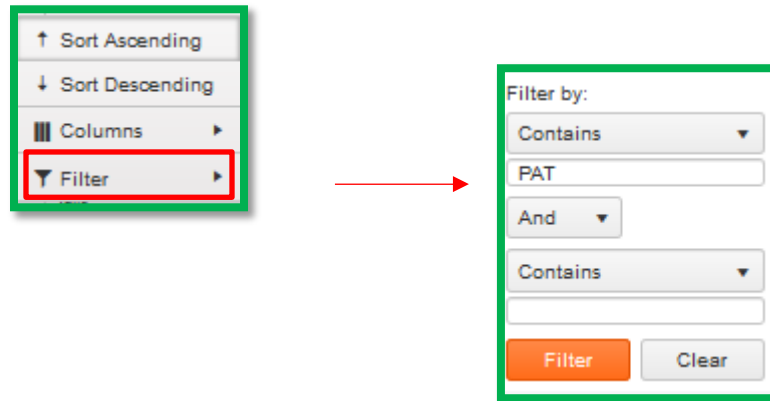

Figure 6: Columnar Sorting and Filtering

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

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.

Figure 8: Edit Receipts Action Window

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
  - Requires the correct patient registry number

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

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