

Bulletin Number: CO_IB_9.1.20	Distribution Date: 09/1/2020	Effective Date: 9/14/2020				
Contact Point: Metrc® Support	Subject: New Caregiver Customer Type					
Reason: Metrc is providing an upo caregiver sales.	date on an upcoming configura	tion change regarding				

Greetings Metrc Users,

The MED and Metrc are providing information on an upcoming change to the available Customer Types that Medical Marijuana Stores can record sales to. Starting on September 14, 2020 a Medical Marijuana Store will be able to record Caregiver Sales, in addition to the already available Patient Customer Type. When selecting a Caregiver as the Customer Type, users will be given the option to enter both the Caregiver and Patient Registration Number. MED notes that Rule 3-405 (A)(1) states, "*Medical Marijuana Stores may only Transfer Medical Marijuana to any patient or caregiver who is permitted to deliver Medical Marijuana to homebound patients or minor patients as permitted by section 25-1.5-106(9)(e), C.R.S..."*

Medical Marijuana Stores should keep this in mind when making sales to a caregiver. This change will also be supported via the API or CSV upload functions. Metrc will also be releasing an API Bulletin informing Third Party Integrators (TPI's) of the new available Customer Type.

Please see the following pages for additional details on this change.



Recording a Caregiver Sale

For the creation of a manual sales receipt, select the sales drop down from the navigation bar. Then select the "Receipts" option as seen in **Figure 1** to open the Sales Reciepts page.

Packages	Transfers -	Sales ▼	Reports	← Admin -
ainte		Receipts		
sipts		Deliveries		

Figure 1: Creating a Sales Reciept

Once on the sales receipts page, select the "Active" tab in **Figure 2** to open the active receipts grid, where recording receipts will be able to be done. Next, select the record receipts button to begin creating the new receipt as seen **in Figure 3**.

Import Sales Daily Sales (read-only)	
Active Inactive	
Please select a tab to view its content.	

Figure 2: Sales Receipts Page

ctive Inactive									
Record Receipts Edit Receipts Finalize									
Receipt	Sales :	Customer Type	Patient :	Caregiver :	Packages	Total	Recorded	Finalized	
 0000002376 	08/05/2020 12:00 pm	Consumer			1	\$50.00	08/05/2020 11:01 am	No	Void
 0000002372 	08/05/2020 11:42 am	Consumer			1	\$100.00	08/05/2020 10:43 am	No	Void
						0400.00	00/40/0047 00:40 am	Ne	

Figure 3: Record Receipts

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The recording receipts action window will open, and enter the necessary information for the sale. When selecting the customer type, the Caregiver button will prompt two fields, Caregiver and Patient Number, to open as shown in **Figure 4** below. These fields may be filled with the caregiver number and the respective patient number for whom the caregiver is making the purchase.

When the information is recorded and correct, select the record sales receipts button and the receipt will be posted to the active receipts page where it could later be edited or finalized as seen in **Figure 5** below.

Record Receipts	×								
Sales Receipt # 1	(clear)								
Sale 08/07/2020 today	Customer 🔵 Consumer 🔵 Patient								
09:34 AM	Caregiver Caregiver Caregiver Patient <u>No.</u> Example								
Package #1 ABCDEF012345670000012172 Q (dear) Available 9 g	Quantity 2 Grams ~ Total Price \$ 22.00								
(package)									
Record Sales Receipts Cancel									

Figure 4: Selecting Customer Type: Caregiver

Active Inactive										
Record Receipts Edit Receipts Finalize										
	Receipt :	Sales :	Customer Type	Patient :	Caregiver :	Packages :	Total	Recorded :	Finalized :	
►	0000002401	08/07/2020 09:34 am	Caregiver	Example	Example	1	\$22.00	08/11/2020 11:51 am	No	Void

Figure 5: Sales Receipts Grid

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Recording a Caregiver Sale via CSV Upload

If reporting a Caregiver Sale through CSV sales uploads, navigate to the CSV Data Import Page on the Sales (new) tab in the Data Import area as shown in **Figure 6**. The sales format should be reported in the following order as seen in respective columns in **Figure 7** shown below; Sales (Date and time sale was made), Customer type, Patient (Patient Number), Caregiver (Caregiver Number), Package Tag UID (Package Number), Quantity Sold, Unit of Measure of Package Sold, Pre-Tax Price Collected. Please note, the Patient and Caregiver numbers are optional for the Caregiver Customer type.

Data Import							CO Lofty Med-Dispensary 402-X000 Colorado Testa		
Please be sure to select the correct files before uploading! A uploaded this will be imported automatically! Core at its suploated, it cannot be removed automatically! Core at the suploated is also to your correct accountically! Core at the suploated is also to your correct account and solity. Core at the suploated is also to your correct account and solity. Core at the substant is also the accounted by arbitrary activity. Core at the support of the accounted by arbitrary activity. Correct accounted by arbitrary accounted									
Package Adj. Sales (new) Sales (update)									
New Sales Receipts Import Please review the New Sales Receipts CSV guidelines for information on the format required by the import process. In imported index to be provided index the Action table in the Sales Receipts cannot be approximately and the Sales Receipts cannot be approximately appro									
Select files									
							[@•][∀•][≡•][+]		
File E Uploaded		Entries		: Status		: User			
		No data is availa	able to display						
H							Ċ 🕇		
CSV Columns	CSV Example								
1. Sale Date/Time 2. Customer Type 3. Patient License Number	10/4/2016 4:44:53 PH,Cons 10/4/2016 4:44:53 PH,Cons	18///2816 4:44:53 PH_CONUMEY_1,46C0EFH21345270000818331,1,0,00:e5,9.99 18//2816 4:44:53 PH_CONUMEY_1,48C0EFH21345570000828331,1,0,00:e5,9.99							
4. Caregiver License Number 5. Package Label	A CSV header row must no	t be included.							
6. Quantity 7. Unit of Measure 8. Total Amount	Files must be plain-text on	ly (e.g. CSV and TXT).							

Figure 6: CSV Data Import Page

Sales	Customer Type	Patient	Caregiver	Package	Quantity	UoM	Price
6/30/2019 11:02	Caregiver	xxx-xx-xxxx	xxx-xxx-xxxx	1A40101000249F2000000002	3	Grams	10.99

Figure 7: Caregiver CSV Format

Please feel free to contact Support at <u>support@metrc.com</u> or 877-566-6506 with any questions.