

Bulletin Number: SD_IB_13: Edit Patient & Caregiver Sales	Distribution Date: 10/05/2023	Effective Date:
Contact Point: Metrc Support	Subject: Sales Receipts	
Topic: Editing Patient and Caregiver Sales Receipts		

Greetings,

We are pleased to provide you with important information regarding editing sales receipts. While many fields can be edited on sales receipts, this bulletin is specific to how to edit a Patient or Caregiver ID when the wrong ID is mistakenly entered.

Note: In addition to correcting this mistake in Metrc, we recommend you also correct the Patient or Caregiver ID within your point-of-sale system. It is not only important for compliance, but important for patients to have access to the medicine they need, and to do that, the allotments associated with their ID must be reported accurately.

Please read on for more information.

Editing Patient or Caregiver ID on Sales Receipts

Metrc LLC

For additional support:

Email Support@metrc.com or call 877-566-6506

Patient and Caregiver IDs are crucial to ensuring that purchase limits are reported accurately. If purchase limits are accounted for inaccurately within the Metrc system, patients can potentially be denied the medicine they need. Alternatively, purchases over the rolling 14-day limit may occur, which can lead to public health issues, looping, or diversion.

To edit a Patient or Caregiver ID on a sales receipt, the steps below should be followed:

1. Navigate to Sales on the navigational toolbar, click the dropdown arrow next to Sales, then click on Receipts to open the Sales Receipts grid – see **Figure 1**.

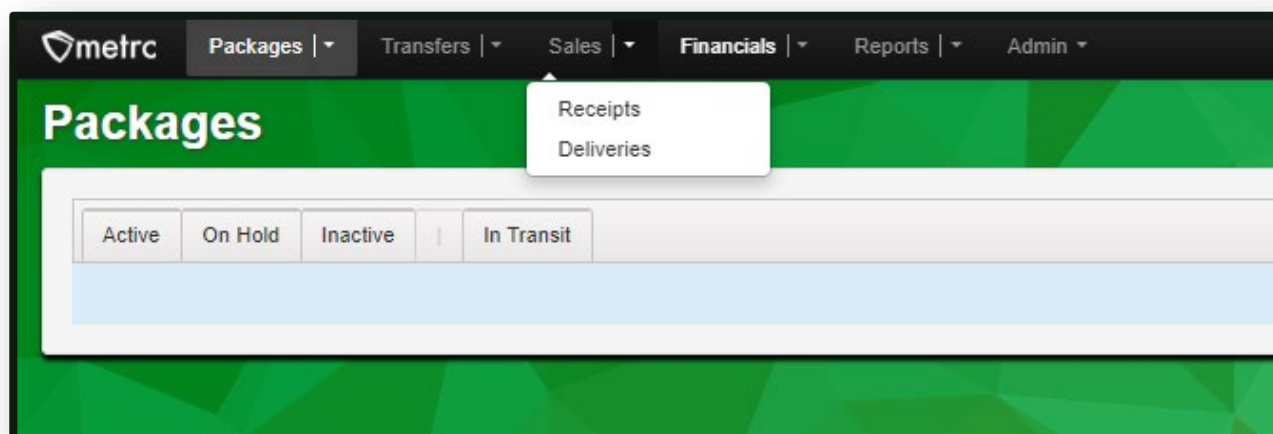


Figure 1: Receipts option in the Sales dropdown

2. From the Sales Receipts grid, select the 'Active' tab, then highlight the Receipt to edit. Once the desired record is highlighted, click the 'Edit Receipts' button – see **Figure 2**.

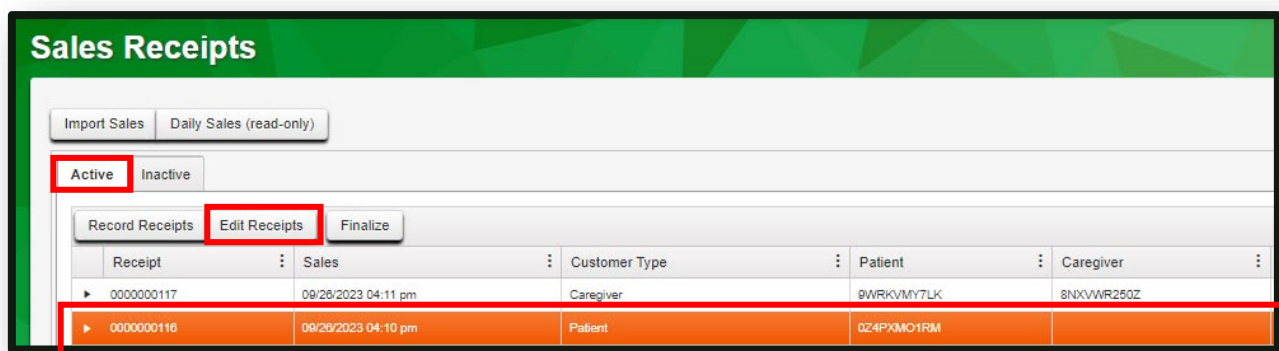
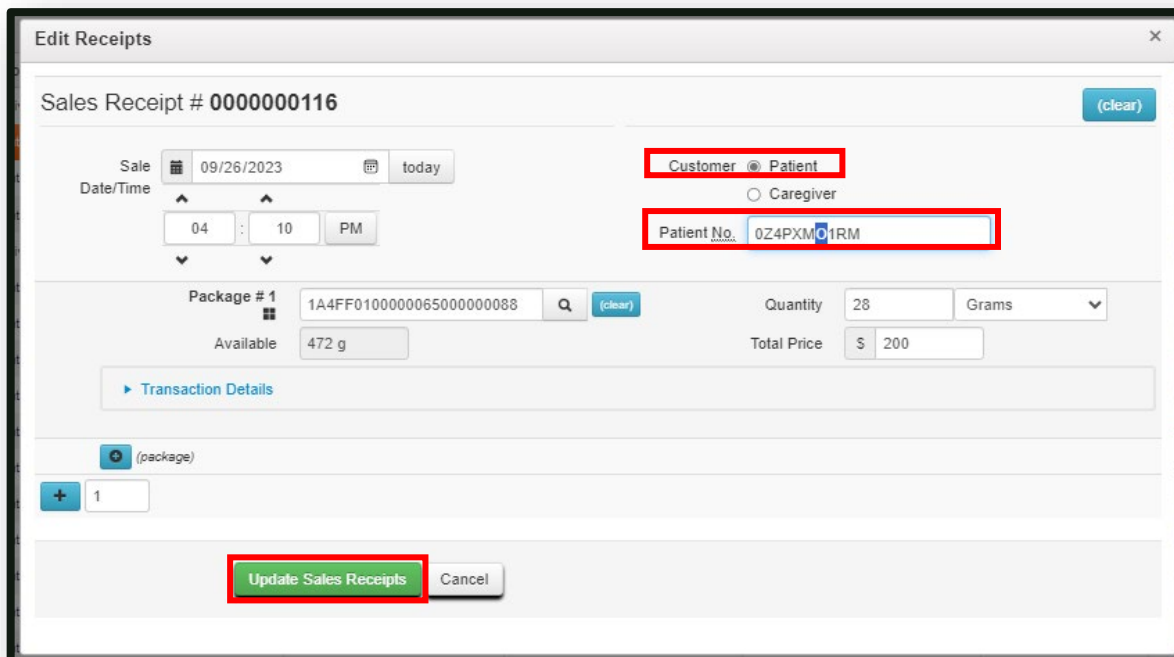


Figure 2: Select the Receipt for Editing

- To correct the Patient Number, click the Patient option under 'Customer', then type in edits in the 'Patient No.' field, then select the green 'Update Sales Receipts' button. In this example, the user accidentally entered the letter 'O' and needs to change it to the number '0' – see **Figure 3**.

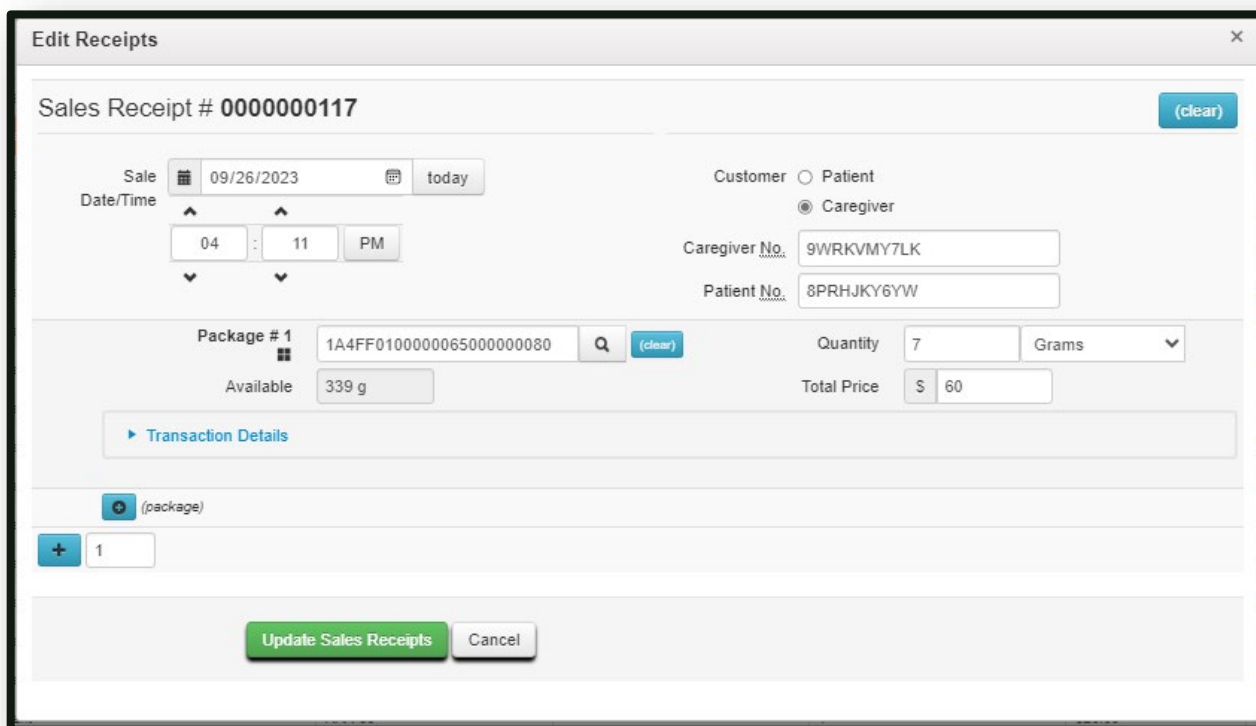


The screenshot shows the 'Edit Receipts' window. At the top, it says 'Sales Receipt # 0000000116'. Below this, there's a 'Sale Date/Time' section with a date picker set to '09/26/2023' and a time picker set to '04:10 PM'. To the right, there's a 'Customer' section with radio buttons for 'Patient' (selected) and 'Caregiver'. Below this, the 'Patient No.' field is highlighted with a red box and contains the text '0Z4PXM01RM', where the 'O' is highlighted. Below the 'Patient No.' field, there's a 'Package #1' section with a search bar containing '1A4FF0100000065000000088' and a 'Quantity' field set to '28'. At the bottom, there's a green 'Update Sales Receipts' button highlighted with a red box, and a 'Cancel' button next to it.

Figure 3: Correcting Patient ID in the Edit Receipts action window

Important note: In South Dakota, Caregivers can purchase cannabis products for patients registered with the state. Caregivers have no purchase limits associated to their ID, so to manage purchase limits for the patients, both the Caregiver ID and the Patient ID must be present on the Sales Receipt.

- To edit a Caregiver ID on a Sales Receipt, follow steps 1 and 2 above. Once completed, the Edit Receipts action window will appear. Then, click the Caregiver option under 'Customer' to access both the Caregiver No. and Patient No. fields. Enter the correct Caregiver ID affiliated with the Patient ID. Once edits are complete, click the green 'Update Sales Receipts' button – see **Figure 4**.



Edit Receipts

Sales Receipt # 0000000117 (clear)

Sale Date/Time: 09/26/2023 today
 04 : 11 PM

Customer: ☐ Patient ☒ Caregiver
 Caregiver No.: 9WRKVMY7LK
 Patient No.: 8PRHJKY6YW

Package # 1: 1A4FF0100000065000000080 (clear)
 Available: 339 g

Quantity: 7 Grams
 Total Price: \$ 60

Transaction Details

(package)

+ 1

Update Sales Receipts Cancel

Figure 4: Correcting Caregiver ID in the Edit Receipts action window

Metrc Resources

If you have any questions, or need additional support:

Contact Metrc Support: Email Support@metrc.com or call 877-566-6506

Metrc Learn: Metrc Learn is designed to offer educational opportunities to enhance users' skills with the Metrc system and provides various training options based on experience level. In addition, the learning system is organized into role-specific programs made up of various courses. To log in, visit [Metrc Learn](#) and enter your login credentials, or to access, register by visiting the [Metrc Learn Registration](#).

Access additional resources: When logged into Metrc, go to the "Support" area on the navigational toolbar and select the appropriate resource, including educational guides and more from the dropdown options.

Thank you for your continued partnership.