

<b>Bulletin Number:</b> SD_IB_13: Revised Edit Patient & Caregiver Sales	<b>Distribution Date:</b> 11/10/2023	<b>Effective Date:</b> Ongoing
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> Sales Receipts	
<b>Topic:</b> Editing Patient and Caregiver Sales Receipts		

This is an updated revision to SD\_IB\_13 that includes how to unfinalize sales receipts for edits.

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.

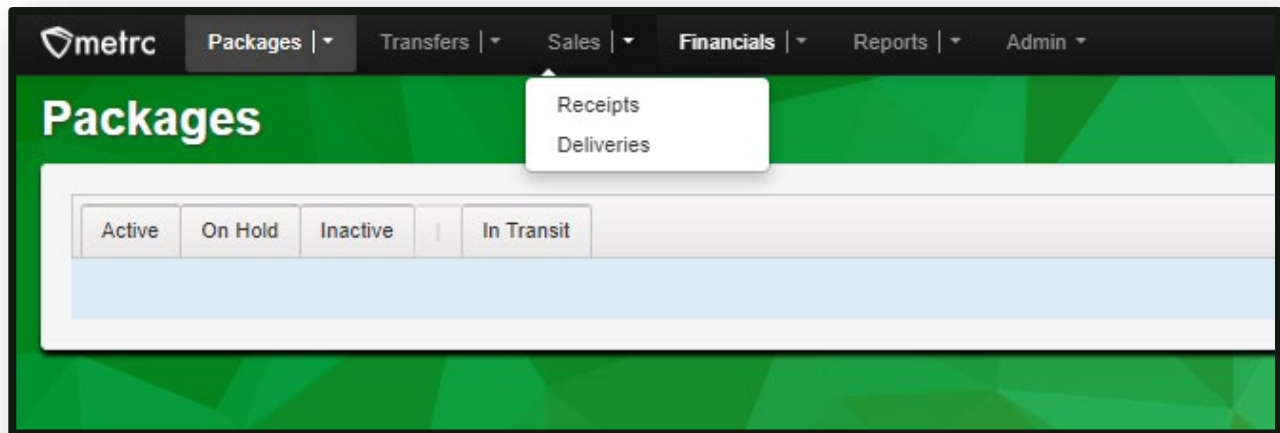
Please read on for more information.

### Editing Patient or Caregiver ID on Sales Receipts

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 may potentially be denied the medicine they are entitled to. Alternatively, purchases over the rolling 14-day limit may occur, which can lead to public health issues, looping, or diversion.

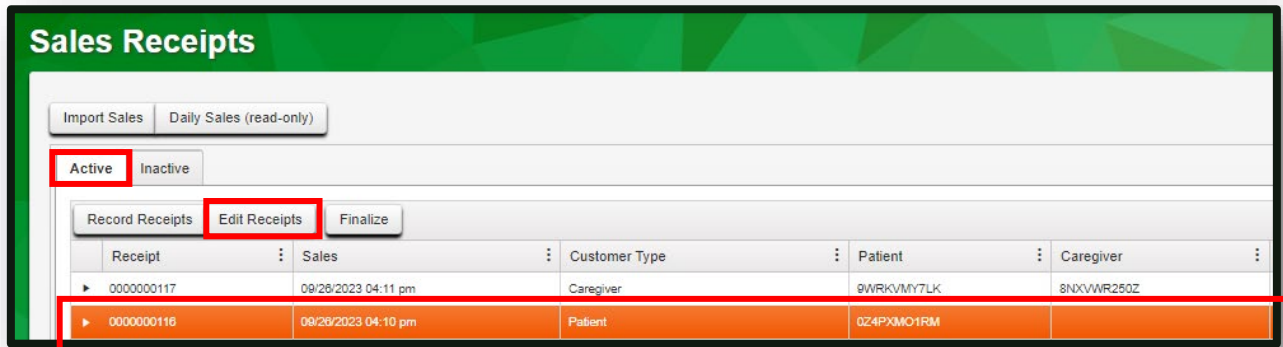
To edit a Patient or Caregiver ID on a sales receipt, the steps below should be followed:

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**.



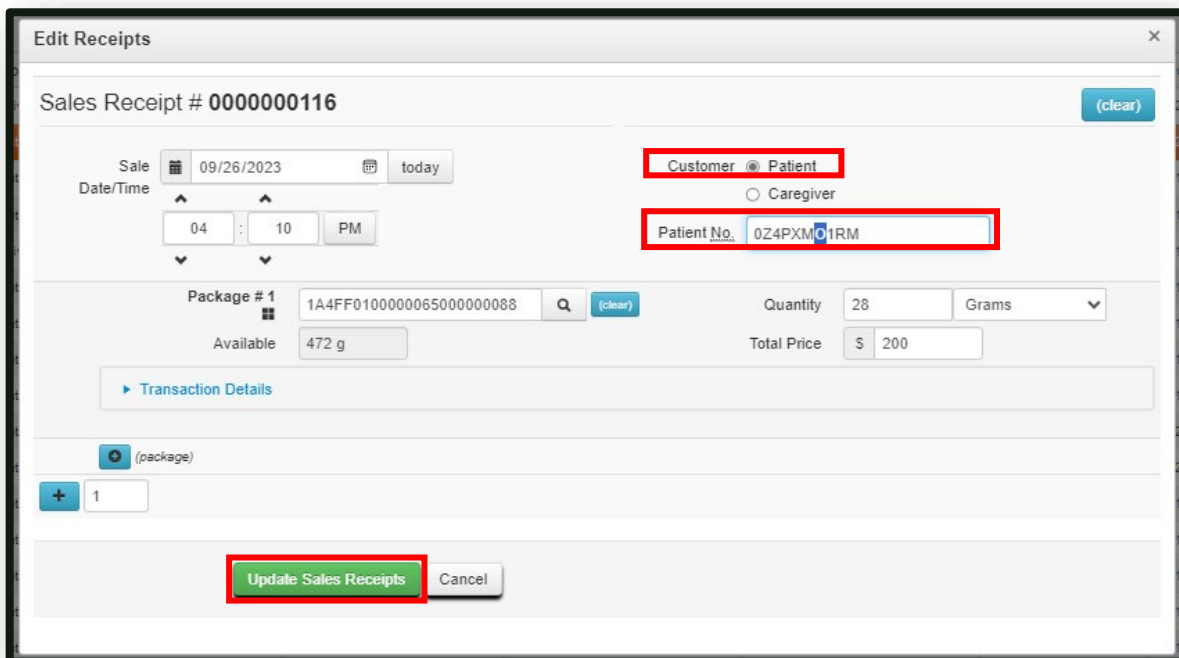
**Figure 1: Receipts option in the Sales dropdown**

- 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**

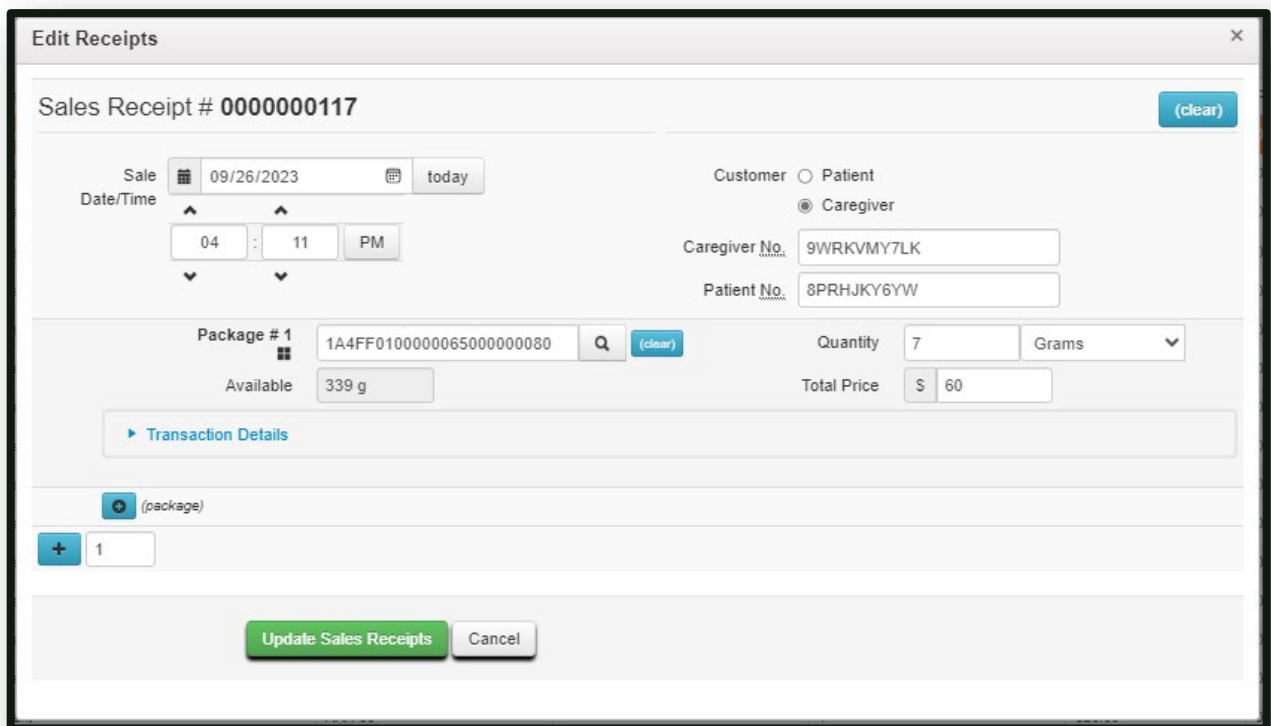
- To correct the Patient Number, click the Patient option under *Customer*, then type in edits in the *Patient No.* field, then select the *Update Sales Receipts* button. In this example, the user accidentally entered the letter 'O' and needs to change it to the number '0' – see **Figure 3**.



**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 with 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.

4. 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, select 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, select the *Update Sales Receipts* button – see **Figure 4**.

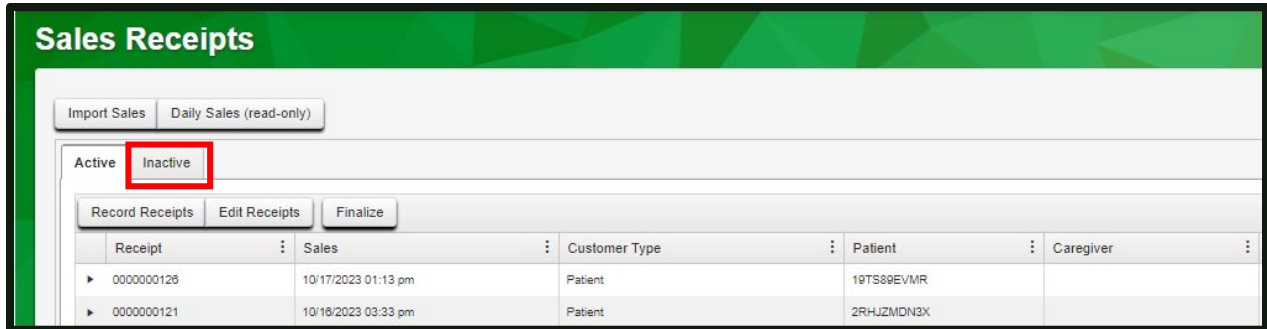


**Figure 4: Correcting Caregiver ID in the Edit Receipts action window**

## Editing Patient or Caregiver ID if the Receipt Has Been Finalized

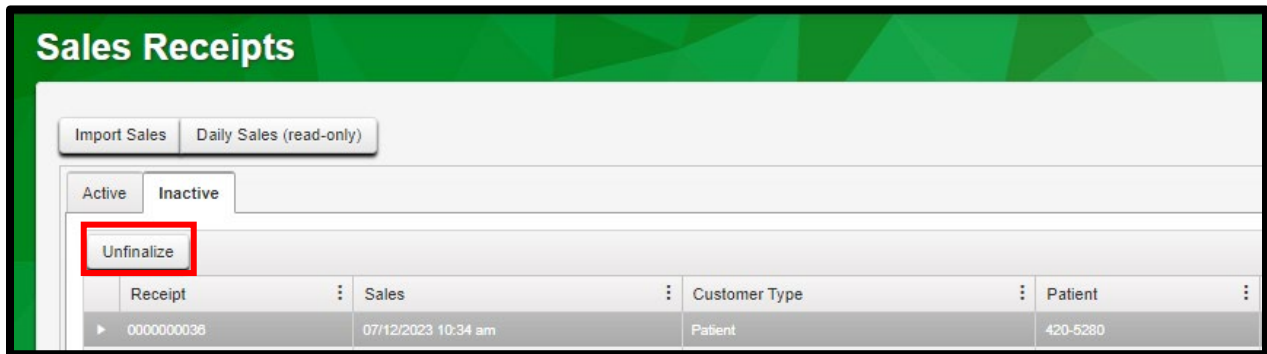
If the receipt that is needing to be edited has been finalized, please follow the below process. To get to this part of the process, please follow Step 1 in the Editing Patient or Caregiver ID on Sales Receipts. Finalized receipts can be found under the *Inactive* tab of the Sales Receipts grid - **see Figure 5**.

1. Start by selecting the *Inactive* tab on the Sales Receipts grid.



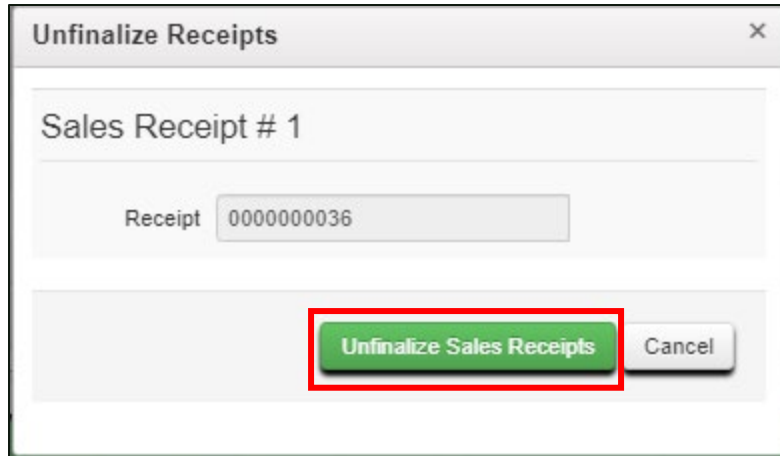
**Figure 5: Select the Inactive Tab to Bring up Finalized Receipts**

2. Highlight the receipt to be edited and select the *Unfinalize* button - **see Figure 6**.



**Figure 6: Highlight Sales Receipt and Select Unfinalize**

3. Confirm the receipt you're unfinalizing and select the *Unfinalize Sales Receipt* button - **see Figure 7 below**.



**Figure 7: Unfinalize Sales Receipt**

4. Once the receipt has been unfinalized, it will move to the *Active* tab. To Edit the Sales Receipt, select the *Active* tab and continue with Step 2 in the Editing Patient or Caregiver ID Sales Receipts process.
5. After the receipt has been edited, the receipt can be finalized by selecting the *Finalize* button for the receipt and the receipt will move back to the Inactive tab.

## **Metrc Resources**

If you have any questions, or need additional support:

**Contact Metrc Support:** Email [Support@metrc.com](mailto: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 facility-specific programs made up of various courses. To login, visit [Metrc Learn](#) and enter your login credentials, or to access, register by visiting the [Metrc Learn Registration](#).

**Access additional resources:** In the Metrc system, click on the "Support" dropdown in the top-right navigation pane and select the appropriate resource, including educational guides and more.

Thank you for your continued partnership.