

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 update on an upcoming configuration change regarding caregiver sales.		

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 Receipts page.

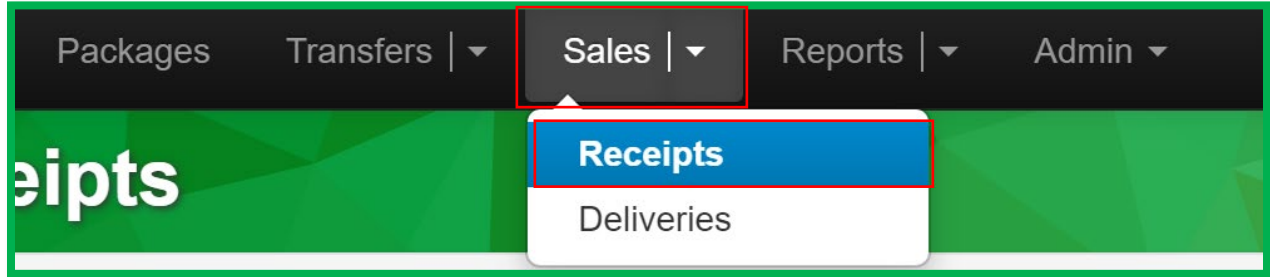


Figure 1: Creating a Sales Receipt

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**.

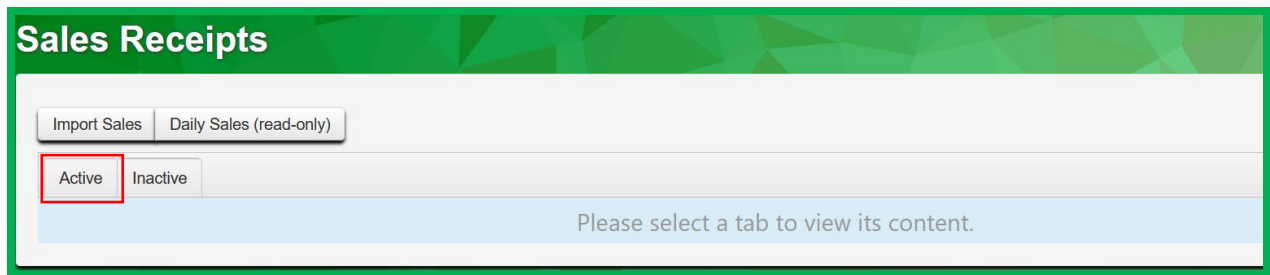


Figure 2: Sales Receipts Page

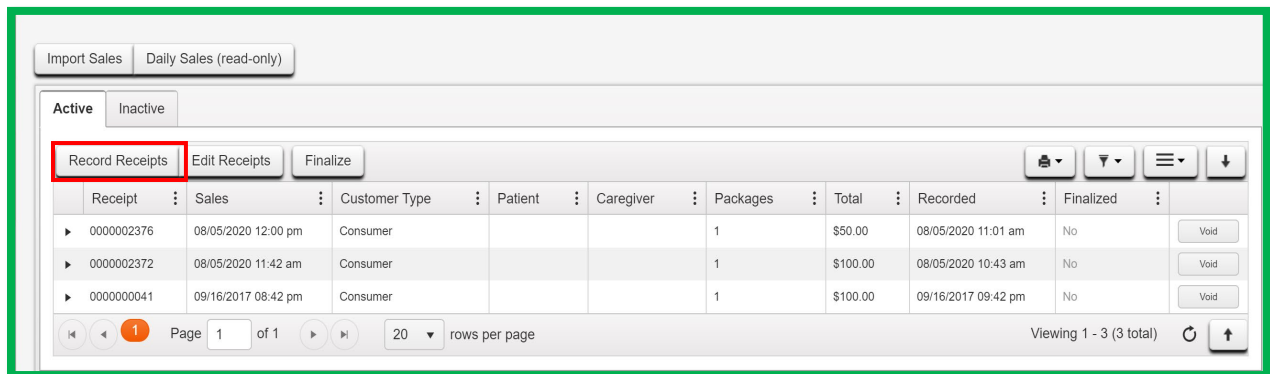


Figure 3: Record Receipts

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.

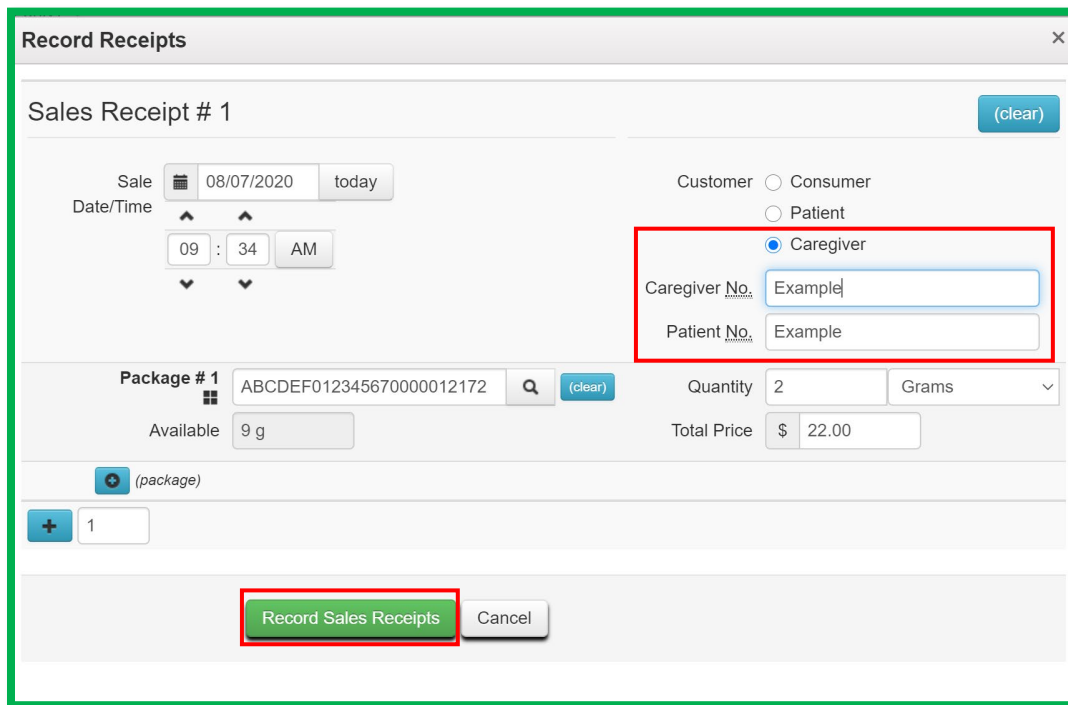
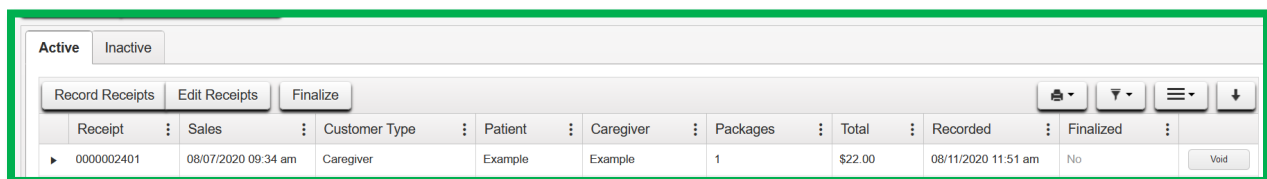


Figure 4: Selecting Customer Type: Caregiver



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

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.

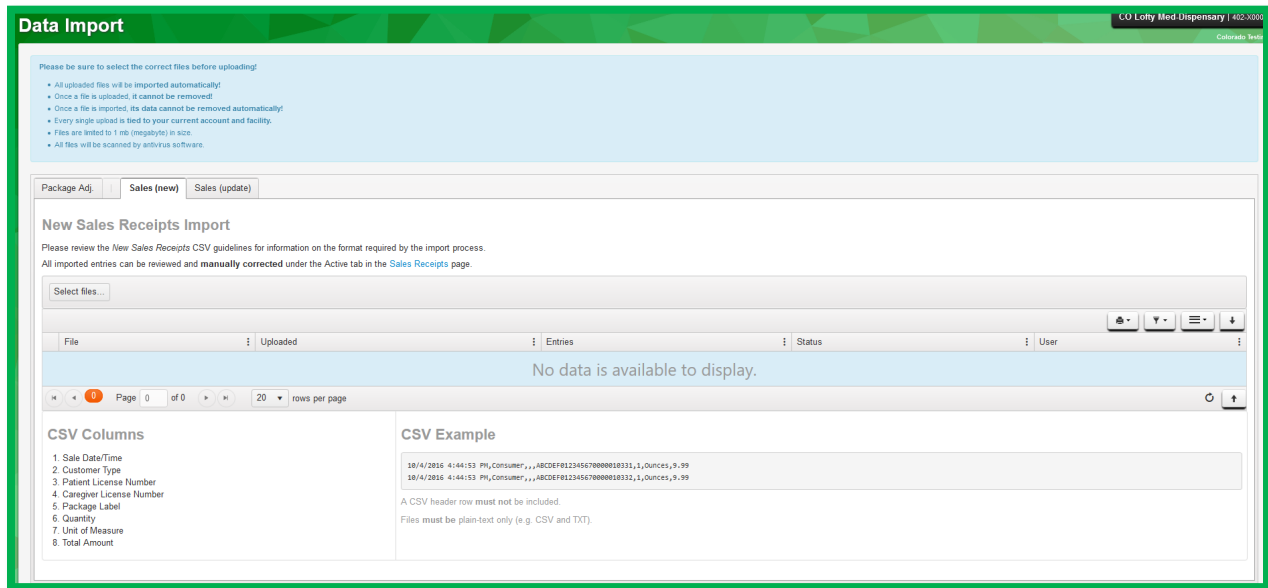


Figure 6: CSV Data Import Page

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 support@metrc.com or 877-566-6506 with any questions.