

Bulletin Number: CO_IB_1.21.22	Distribution Date: 01/25/22	Effective Date: 01/25/22
Contact Point: Support@metrc.com	Subject: Legislative Changes Common Questions and Clarifications	
Reason: MED and Metrc are providing guidance on commonly asked questions following the legislative changes that were made regarding patient sales on January 1 st , 2022		

Greetings Metrc Users,

The MED and Metrc are providing additional details around commonly asked questions following the development of new functionality to the Patient Membership's Grid, Patient Status Lookup, and Sales requirements for patients to support implementation of Colorado legislation that went into effect on January 1st, 2022.

Metrc has previously released two bulletins indicating the following:

- Bulletin on December 2nd can be found [here](#).
 - Detailed certain Item Categories that were updated to support capturing newly required information. The changes were needed to allow the system to effectively identify potential discrepancies in daily authorized quantity limits and THC potency authorizations as required by legislation.
- Bulletin on December 30th can be found [here](#).
 - Detailed the updates made to the Patient Memberships Grid, the new Patient Status Lookup, and updates Sales requirements.

Metrc has provided support of these changes through the Application Programming Interface (API) for Third Party Vendors (TPVs) to update items based on the category changes that went into effect along with the additional details for new patient and sales functionality covered in API Bulletin 99.

Please see the following pages for more information regarding common questions and best practices to support the new legislation.

Known Issues and Future Development

Metrc has identified two items that are being updated this week to address validated issue reports that have been received.

- i. The ability to edit Member Patients prior to 12/31 will be corrected so all historical patients can be edited by Medical Stores.
- ii. The API will be updated to address an error message Point of Sale vendors are receiving when trying to sell Concentrate (Each) items that have not been updated with Unit Weight.

Metrc did receive and identify reports regarding intermittent performance issues January 3rd – 6th. Metrc has adjusted the database to address these issues and have not received or identified, through our system monitoring, any issues since the 6th.

MED and Metrc continue to track additional development opportunities related to the legislative implementation changes that went into effect January 1, 2022. For example, a long-term solution for connecting test results to the packaged items is under evaluation and analysis. Additionally, we are planning to update the unit of measurements in the Patient Memberships grid and Patient Status Look-up for Concentrates to be reflected in grams and Infused Products to be reflected in mg. As soon as more definitive timelines are available for these updates, we will provide more information.

Commonly Asked Questions

1. How should a patient be entered within the Patient Memberships, Patient Lookup, or within the Sales Receipts/Deliveries?
 - b. A Patient's MMR card must be entered to match exactly as it shows on their card.
 - i. 12-345-678-EE – **Correct Format**
 - ii. 12-345-678-ee – **Incorrect Format**
2. Do all patients need to be entered as Members?
 - a. No, please see the "Recommended Best Practices" at the end of this bulletin for when patients should be entered as members. If a Point-of-Sale system is indicating that this is a requirement, then it may be a step the third party system would like a medical store to take for their processes, but it is not a system requirement within Metrc.
3. When does a Medical Store need to input additional fields (THC %, Unit Weight, or THC Content) within the Sales Receipts or Deliveries?

- a. If an item has not been updated based on the category requirement changes outlined within the Bulletin released on December 2nd, then a Medical Store will be required to input the information within the Sales Receipts or Deliveries. If that item has been updated, the information will automatically populate on the Sales Receipt.
4. How can a Medical Store avoid having to enter the newly required fields at the point of sale?
 - a. There are two other ways outside of entering the newly required fields for certain items categories.
 - i. The recommended approach would be for the licensee, who is the original creator of the item, to edit their existing item with the newly required information. When doing so, all packages associated with that item will automatically be updated. If the Medical Store is not the original creator of the item, they can contact the licensee that was and request that the item be updated.
 - ii. Alternatively, a Medical Store can create their own items and repackage any inventory that has not been updated by the originating license to ensure the active packaged inventory has the required item fields associated.
 5. The flower, concentrate, and THC amounts available are not correctly reflecting that amount to purchase in grams.
 - a. Metrc has identified a rounding adjustment that was made to the Concentrate and Infused categories to raise the Concentrate Ounces Allowed to .2822 and the THC Ounces Allowed to .7055. As a reminder to all licensees, Metrc tracks one ounce to be equal to 28.3495 grams.
 6. How can a Medical Store see if the items associated to packages within inventory have been updated to reflect the newly required category changes?
 - a. Toggle to the Package Grid and select the “Three Dot” icon next to any column as seen in **Figure 1**. Select the column that is relevant for searching on the packages grid. For the newly required fields, it is recommended that a Medical Store add Unit THC Percent, Unit Weight, and Unit THC Content to the grid.

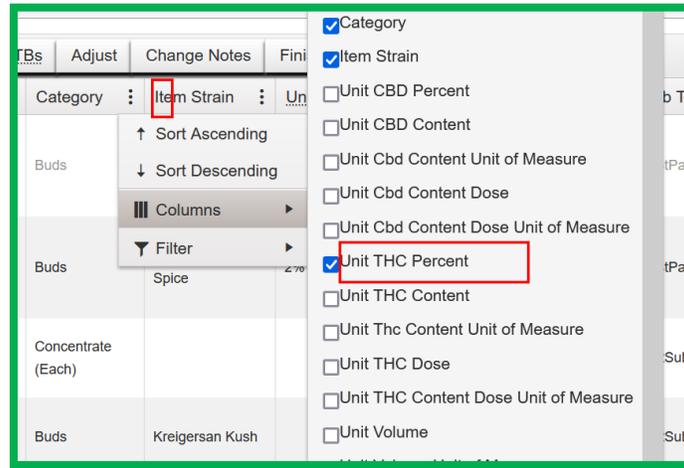


Figure 1: Column Sorting in Packages Grid

- b. Select the “Three Dot” icon for the Category column and filter for the relevant category that you would like to see item details for.

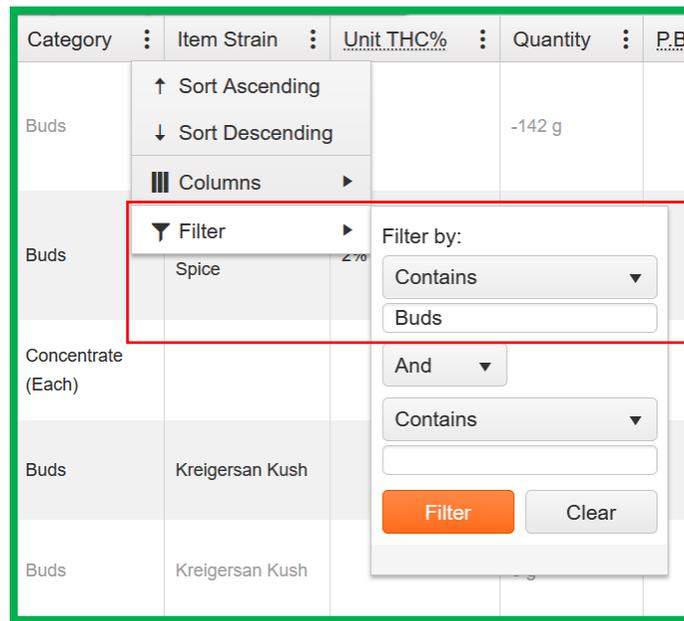


Figure 2: Filtering for Item Category

- c. Select the column that is relevant to filter and double click the header information. A small arrow will appear and the information that has been populated will be sorted from highest amount to lowest.

Tag	Src. H's	Src. Pkg's	Item	Category	Item Strain	Unit THC% ↓	Quantity
▶ Q ■ 1A4FFFD203D572100000150	2016-07-21- Harvest Room-M	1A4FFFD203D5721000002756	A1 OG Flower	Buds	A1 OG	15%	2 g
▶ Q ■ 1A4FFFD203D572100000151	2016-07-21- Harvest Room-M	(multi-package)	A1 OG Flower	Buds	A1 OG	15%	8 g
▶ Q ■ 1A4FFFD203D5721000002756	2016-07-21- Harvest Room-M	ABCDEF012345670000012518	A1 OG Flower	Buds	A1 OG	15%	99 g
▶ Q ■ 1A4FFFD203D5721000002759	2016-07-21- Harvest Room-M	ABCDEF012345670000012518	A1 OG Flower	Buds	A1 OG	15%	3.5 g
▶ Q ■ 1A4FFFD203D5721000000071	Beginning Inventory Location HB 10-16-2020	ABCDEF012345670000014793	Grogu 5.5g	Buds	Mandalorian Spice	2%	11.5 g
▶ Q ■ 1A4FFFD203D5721000000090	4-6	ABCDEF012345670000013805	Kreigersan Kush Flower	Buds	Kreigersan Kush		192.6874 g
▶ Q ■ 1A4FFFD203D5721000000079	2016-07-21- Harvest Room-H	ABCDEF012345670000012324	Buds - Joe's Secret	Buds	Joe's Secret		134 g
▶ Q ■ 1A4FFFD203D5721000000080	2016-07-21- Harvest Room-M	ABCDEF012345670000012429	Buds - Metrc Bliss	Buds	Metrc Bliss		195 g

Figure 3: Updated Packages Grid with New Column and Filtered Category

7. If a patient does not have the standard authorization limit amounts when a Medical Store checks allotments, what does that indicate?
 - a. If a Medical Store looks up a patient and sees their Flower, THC, or Concentrate allowances are higher or lower than what the standard authorization is, then that would indicate the patient has been entered as a Member at a licensed Medical Store. Therefore, if a patient is disputing their allowable amounts, it is recommended to review their authorization information. The Medical Store where the patient is attempting to purchase from can input updated information into the Memberships grid which Metrc will reflect as the updated authorization amounts.
 - b. Please note that a patient should not have 0 entered for their THC or Concentrate authorizations. The Medical Store should confirm the correct authorization amounts for the patient and update the Memberships grid with the accurate information.

8. What if a Medical Store is still experiencing potential issues regarding patient allotments?
 - a. Please reach out to support@metrc.com and outline the details regarding the sale, patient number, and potential issue that is occurring. If the issue is occurring with a point-of-sale system, please ensure the vendor is reaching out to api-info@metrc.com.

Recommended Best Practices For New Functionality

The MED and Metrc wanted to outline general steps for Medical Stores to consider when dispensing to patients based on their authorization amounts after **January 1st, 2022**.

New Patient Enters Store with Standard Recommendation:

1. Medical Store Employee uses Patient Status Look-up Tool (magnifying glass) to search amounts available for purchase by patient identification number (##-###-###-AA).
2. If patient has adequate amounts available, continue to record sales receipt.
3. Enter packages being purchased along with quantity(ies) and price. If the required packages item attributes (THC %, Unit Weight, or THC Content) are not already associated with item, enter the attributes for the item.
4. Once all items are entered, check the “status” button.
5. If a green check returns, record the sale. If a red “X” returns, reverify that the items being purchased do not put the patient over their sales quantity or THC potency authorization amounts.

New Patient Enters Store with Recommendation for More Than Standard Amounts:

1. Medical Store Employee goes to Patient Membership grid and add a new patient member with their identification number ((##-###-###-AA), sales quantity limits and THC potency authorizations.
2. Employee uses Patient Status Look-up Tool (magnifying glass) to search amounts available for purchase by patient identification number.
3. If patient has adequate amounts available, continue to record sales receipt.
4. Enter packages being purchased along with quantity(ies) and price. If the required packages item attributes (THC %, Unit Weight, or THC Content) are not already associated with item, enter the attributes for the item.
5. Once all items are entered, check the “status” button.
6. If a green check returns, record the sale. If a red “X” returns, reverify that the items being purchased do not put the patient over their sales quantity or THC potency authorization amounts.

Existing Patient Already on Membership Grid Arrives to Make Purchase:

1. Medical Store Employee goes to Patient Membership grid and verifies existing patient identification number is entered according to standard convention of “##-###-###-AA”, enter updated sales quantity limits for concentrates and THC infused products, and THC percentage authorizations as needed.
2. Employee uses Patient Status Look-up Tool (magnifying glass) to search amounts available for purchase by patient identification number.
3. If patient has adequate amounts available, continue to record sales receipt.
4. Enter packages being purchased along with quantity(ies) and price. If the required packages item attributes (THC %, Unit Weight, or THC Content) are not already associated with item, enter the attributes for the item.
5. Once all items are entered, check the “status” button.

Metrc Support Bulletin



6. If a green check returns, record the sale. If a red "X" returns, reverify that the items being purchased do not put the patient over their sales quantity or THC potency authorization amounts.

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions.