Metrc Support Bulletin

Bulletin Number: CO_IB_12.27.21	**Distribution Date**: 12/30/21	**Effective Date**: 01/01/22
Contact Point: Support@metrc.com	**Subject**: Patient and Sales Updates	
Reason: MED and Metrc are providing guidance on new patient memberships, patient lookup, and sales requirements to support implementation of Colorado legislation.		

Greetings Metrc Users,

The MED and Metrc are providing details regarding the development of new functionality to the Patient Membership's Grid, a new Patient Status Lookup tools, and new Sales requirements for patients to support implementation of Colorado legislation.

On **December 2, 2021**, Metrc released a bulletin indicating certain Item Categories would be updated to support the capturing of related 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.

Metrc has provided support of these changes through the Application Programming Interface (API) for Third Party Vendors (TPVs) to update the category changes going into effect along with the additional details for new patient and sales functionality that will be released on **January 1st, 2022**.
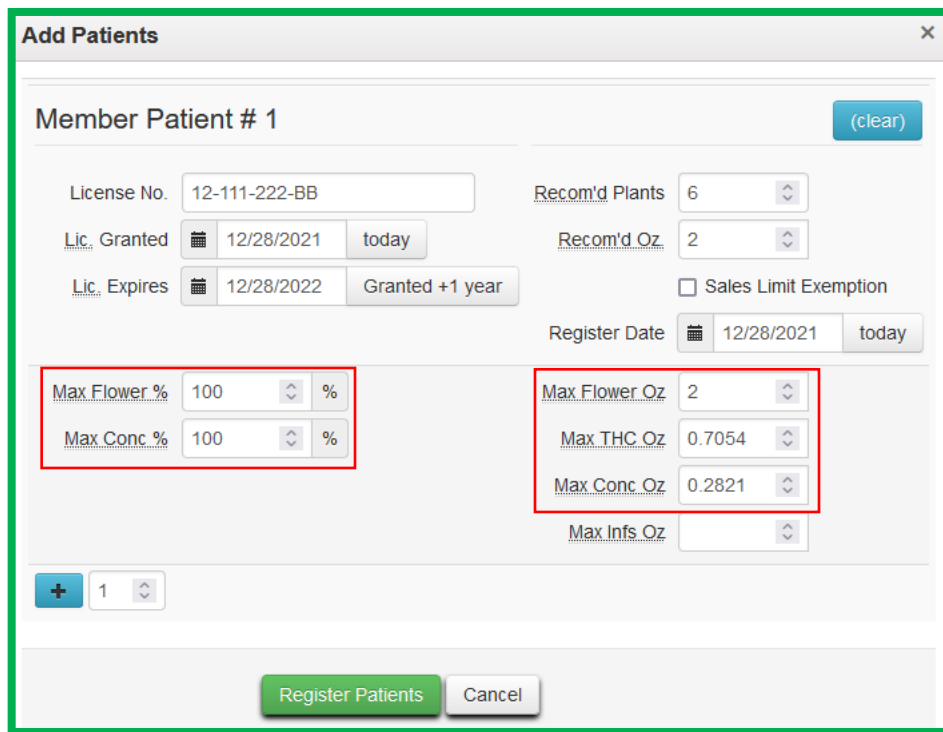
Please see the following pages for more information on these changes.

Patient Membership Updates

In order to support the patient limit requirements, Metrc will automatically be applying the standard limits to all patients that have been recorded at the point of sale as outlined within the Item Category Equivalencies section. **If a patient is recommended a different sales quantity limit or THC potency authorization than the standard setting, then that must be reflected by the Medical Store within the patient membership for those amounts to be reflected for a patient to purchase.**

Metrc will be configured to require validation of Patient Number Entry after January 1st. Configuration of the patient license number must be "##-###-###-AA" as this is reflective of the patient schema for Colorado Patient Registry Cards. This validation is not limited to sales receipts but applies to patient memberships and anywhere else that a patient number is entered or looked up in Metrc.

The Max Infused Ounces should not be filled out at this time and be left blank if updating a patient purchase amounts. The Max THC Oz should be used to enter infused product sales limits, e.g. 20,000 mg.

Figure 1: Updated Patient Memberships Dialog Box

Please Note: If a patient number does not match the schema outlined above, the patient will be recognized as inactive.

At this time Concentrate and Infused Product limits are reflected in ounces rather than grams and milligrams respectively. We are working to make updates to the unit of measure for those categories. The system will default limits to the statutory limits of:

- Max Flower Oz: 2 ounces
- Max THC Oz (intended to be infused product): 0.7054 oz (this equals 20,000 mg)
- Max Conc Oz: 0.2821 oz (this equals 8 grams)

If a patient has a recommendation above or below the standard amount, the amount will need to be entered in ounces for the time being. Here is a table that can be used for reference:

Category	Recommendation Amount	Amount to be entered in ounces
Concentrate	2 grams	.0706 ounces
Concentrate	10 grams	.3527 ounces
Concentrate	12 grams	.4233 ounces
Concentrate	16 grams	.5644 ounces
Infused Product	25,000 milligrams	.8819 ounces
Infused Product	30,000 milligrams	1.0582 ounces
Infused Product	40,000 milligrams	1.411 ounces

New Patient Status Lookup

The Patient Status Lookup will help Medical Stores ensure a patient does not make purchases that total more than the daily permitted amount. Users with the ability to conduct sales will need to ensure they are granted the appropriate permission by the Metrc admin, or an employee who can edit employee permissions at their facility.

The permission will be found within the "**Search Menu"** for **"MMC's"** only as shown in **Figure 2**.
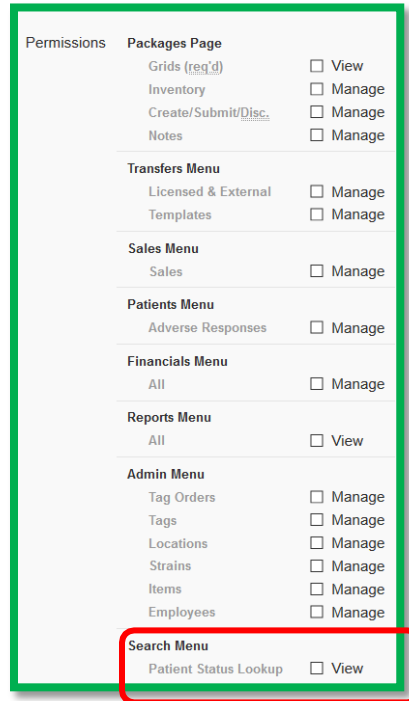

Figure 2: Employee Permission for Patient Status Lookup

Once the permission is granted to a user, the patient status lookup will be the magnifying glass in the top right-hand side of the toolbar as shown in **Figure 3**.

Figure 3: Magnifying glass for Patient Lookup

When selecting the magnifying glass, you will be prompted to a Patient Status Lookup action window that will be the same as the example below in **Figure 4.**
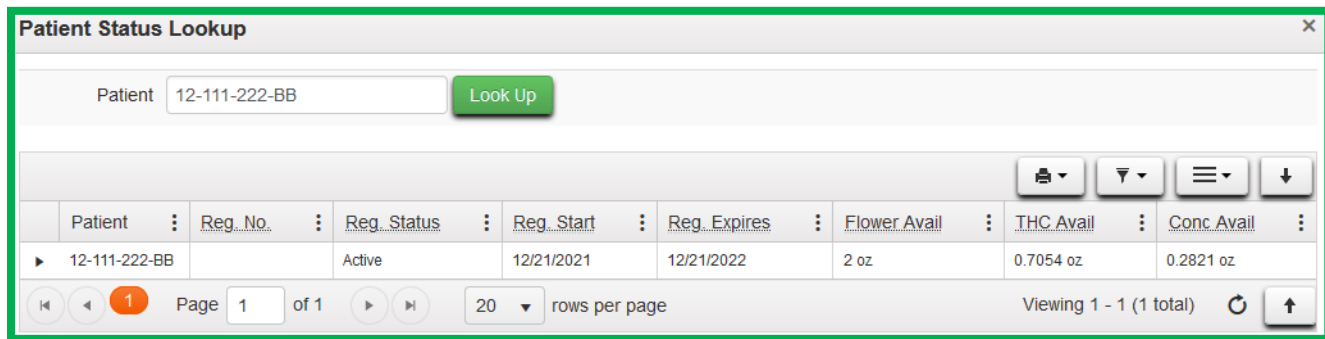
Figure 4: Patient Status Lookup

Key points about the patient lookup:

- Patients must be looked up prior to a sale and the patient number **must match the exact format as the card shows,** otherwise the lookup will not find the proper patient number and a sale will not be permitted to be processed.
- Medical Stores **will not** be able to see the purchase history or previous locations of the patient.
- Flower Available will designate the Medical Marijuana Flower amounts available for purchase. This will capture all items recognized as Marijuana Flower that are being sold.
- THC Available will designate the Medical Marijuana Infused Product amounts available for purchase. This will capture all items recognized as Marijuana Infused Product that are being sold.
- Concentrate Available will designate the Medical Marijuana Concentrate available for purchase. This will capture all items recognized as Marijuana Concentrate that are being sold.
- All three of these limits are "linked" meaning that a patient is able to purchase 100% of a daily allotment that can equate to a number of purchase combinations on a given day.
    - For example, if a patient with standard recommendations wanted to purchase an ounce of flower, then the remaining allotment for that day would be one ounce of flower, 4 grams of concentrate, **or** 10,000 milligrams of infused products.

Sales with New Category Requirements

The updates being made to the existing categories are intended to assist Medical Store licensees in identifying sales quantity and THC limits associated to items within their inventory. These updates will provide references and visibility to a Medical Store licensee if a sale to a patient will put them over their daily limit.

In order to support these changes at the point of sale, Metrc will be deploying an update on **January 1st** to the sales receipts dialog box as seen in **Figure 5** as well as the deliveries dialog box. This will allow Medical Store licensees the ability to input the THC Content, Unit Weight, and/or THC% directly when recording their sales receipts **if the item has not been updated as outlined in Editing Existing Item and Adding New Item with New Category Requirements.**

Meaning, if a licensee has not updated their existing items by January 1st, there will still be the ability for the Medical Store licensee to input that information via the API or directly in the sales receipt dialog box to mitigate any items from being sold to a patient within the licensees existing inventory.

The other new feature within the sales receipts and delivery dialog box is the "Status" icon next to the patient. Once all relevant details on the sales receipt grid are filled out, the Status button will be required to be selected prior to the sale. If the icon is green as seen in **Figure 5**, then the sale can be processed with no further action. If the icon is red, then the employee must select the "Override Purchase Limits" checkbox prior to recording the sale as seen in **Figure 6**.
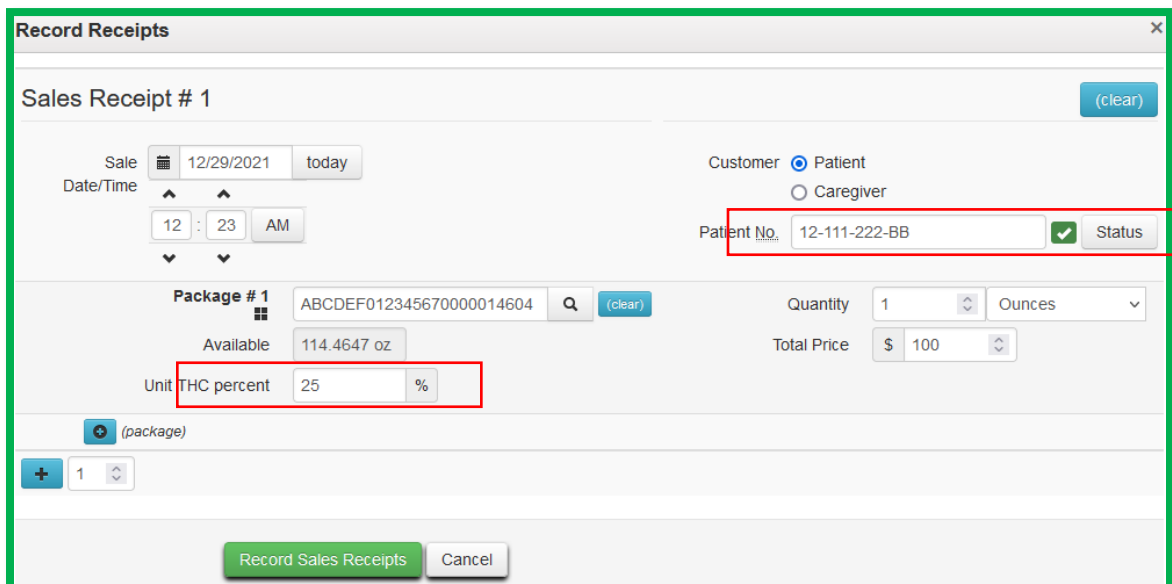

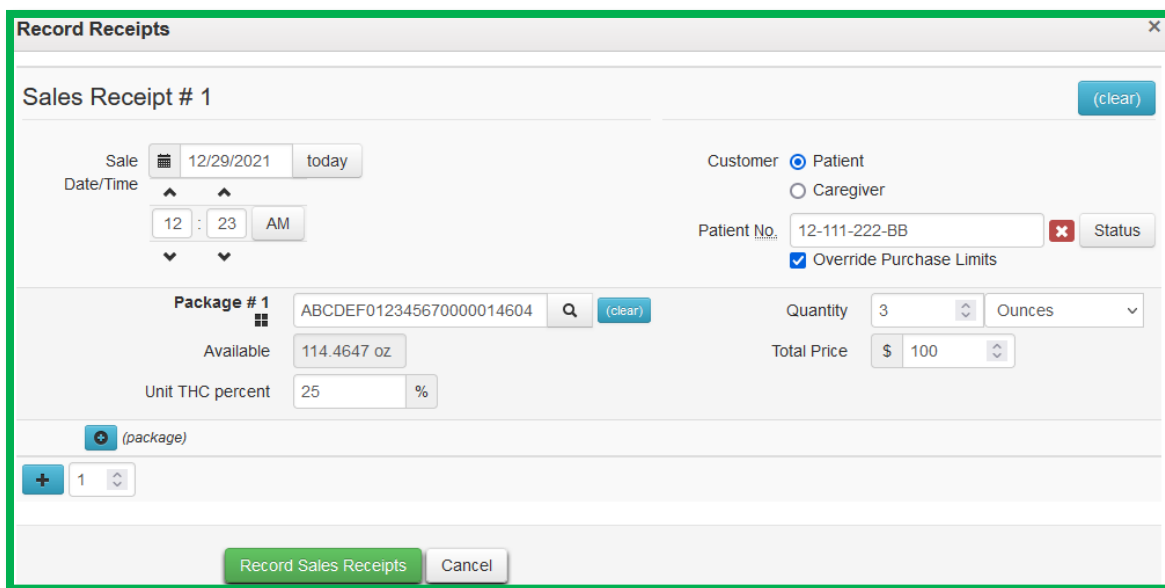**Figure 5: Example Sales Receipt Dialog Box with THC Percent**

Figure 6: Example Sales Receipt Dialog Box with THC Percent

Item Category Equivalencies

In Colorado, Patient Limits are established by statute, but a physician may make a recommendation for amounts above the statutory limits.

- *The standard limit is based on the values below*

    - *Two (2) ounces of marijuana flower*

    - *20,000 mg of marijuana infused products including edibles OR;*

    - *Eight (8) grams of Concentrate*

- Depending on the item category, the amount deducted from the patient's available limits is either the weight or THC content of the product sold. These limits are linked, meaning if 2 ounces of flower is sold, then 20,000mg of infused products would also deduct from the available amount to purchase.

Flower Available to be sold is based off the weight or "Unit Weight" sold in the following categories. These Item Categories will directly deduct the Flower Available for a Patient. Please note that any category equivalency that is recognized as Marijuana Flower is a 1 to 1 deduction. So, if one gram is sold, the available amount of flower available would reduce by 1 gram. Any category recognized as Marijuana Concentrate is a 7.08 grams of flower to 1 gram of concentrate deduction. So, if one gram of concentrate is sold, the available amount of flower would reduce by 7.08 grams.

<u>Recommended Best Practices For New Functionality</u>

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 green check returns, record the sale. If the 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 green check returns, record the sale. If the 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 infused products, and THC potency 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.
6. If green check returns, record the sale. If the 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