Metrc Support Bulletin

Bulletin Number: CO_IB_05.22.2024	Distribution Date: 05/22/2024	Effective Date: 12/15/2023
Contact Point: Metrc Support	Subject: Use by Date Functionality Updated bulletin	
Reason: To provide guidance regarding how to utilize the Use by Date functionality		

Greetings,

Metrc is pleased to provide information regarding how to utilize the Use by Date functionality. This functionality allows industry users to assign a Use by Date to a package either upon creation or while the package is active.

The Use by Date functionality was available starting 12/15/2023 and remained optional until 1/1/2024. Starting 1/1/2024 all newly created packages require a Use by Date.

Please read on for detailed information regarding this new functionality.

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New Package Use by Date

The Use by Date is assigned to products at the Package level. When creating a new package, start by clicking into the Packages area on the navigational toolbar. Then, click the Active tab and select the New Packages button to access the New Packages action window. A user can also highlight an active package from the grid before selecting the New Packages button to auto-populate the source package tag information - see **Figure 1.**
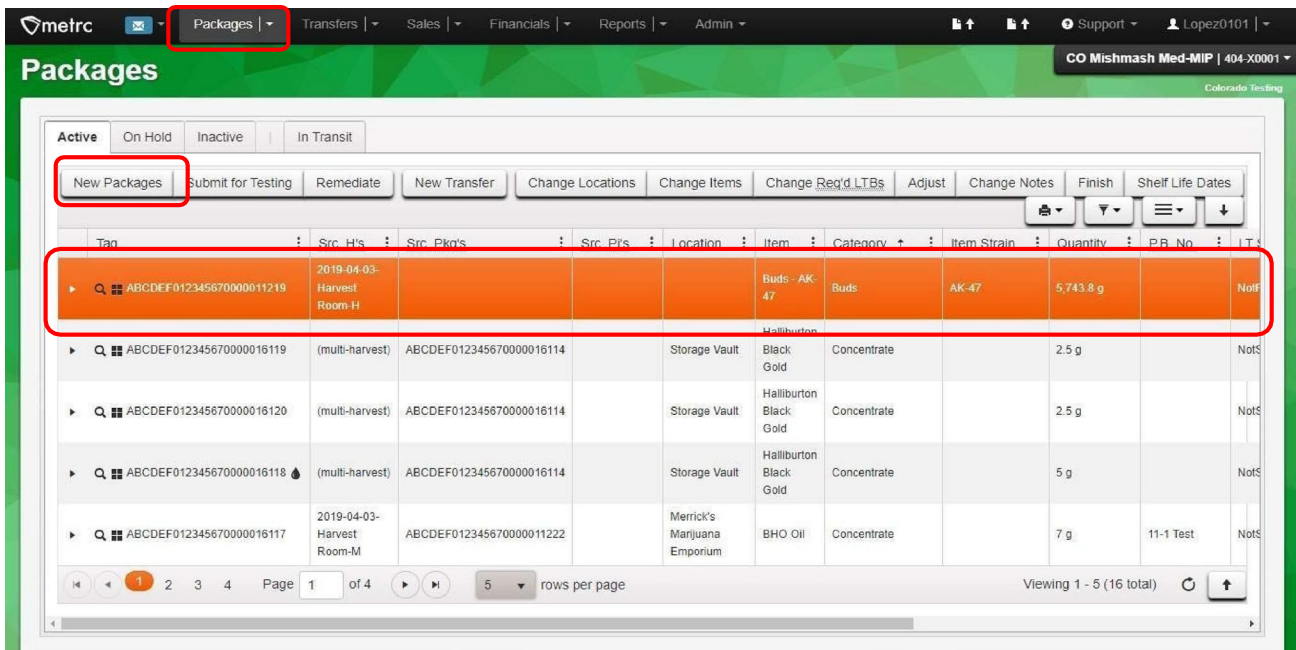

Figure 1: Accessing the New Package action window via the Packages grid

This will open the New Packages action window to enter the package information to follow the existing process for creating a new package. After an Item has been selected within the Item field in the action window, there will be a new field that allows the user to enter the Use-by Date. Any new package marked as the Same Item will carry the same Use by Date as the source package until a production batch event occurs, at which point, the package will carry the newly entered Use-by Date or the newly triggered default date.

To expedite the package creation process, click on the blue checkbox to the right of the Use-by Date field to populate the Use by Date associated with the related harvest batch date, or production batch date, using the State-configured default number of days. The populated Use by Date will be editable as needed. Once all information has been entered appropriately, select the green Create Packages button - **see Figure 2** below.

Figure 2: Creating a New Package with a Use by Date

Note: Manufacturer licensees creating Production Batches of Vaporizer Delivery Devices and/or Pressurized Metered Dose Inhalers must enter those corresponding expiration dates as a Use by Date in the Inventory Tracking System. Manufacturer licensees that create Edible Regulated Marijuana Products and elect to use expiration dates for labeling purposes must enter the expiration date as Use by Date in the Inventory Tracking System. Similarly, Manufacturer licensees creating Edible Regulated Marijuana Products that elect to use the Use by Dates for labeling purposes must enter the Use by Date in the Inventory Tracking System.

As of May 21, 2024, the Use-by-Date field will be available within the create packages template. After inputting all information, click on the blue checkbox to the right of the Use-by Date field to populate the Use by Date associated with the related harvest batch date, or production batch date, using the State-configured default number of days. The blue checkmark will auto populate the use-by-date across all packages associated with the template. The populated Use by Date will be editable as needed on each package creation. Once all information has been entered appropriately, select the green Create Packages button to create all associated packages - **see Figure 3** below.

Figure 3: Creating a New Package Template with a Use by Date

Once the new package has been created, it will appear in the Packages grid under the Active tab. A U.B. (Use by Date) column has been added to the Packages grid, and the column is also sortable and filterable. When a product is 10 days away from reaching its Use by Date, the package's font and Use by Date will be orange. Once a package has reached or surpassed its Use by Date, then the package's font and Use by Date will be red indicating the Use by Date has expired. - **see Figure 4** below.

Figure 4: Use By Date Column on the Packages Grid

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Edit Use by Date

The Use by Date can be edited by a user if needed. To change the Use by Date of a package, highlight the package needing the Use by Date edited in the active Packages grid and select the Shelf Life Dates button - **see Figure 5.**
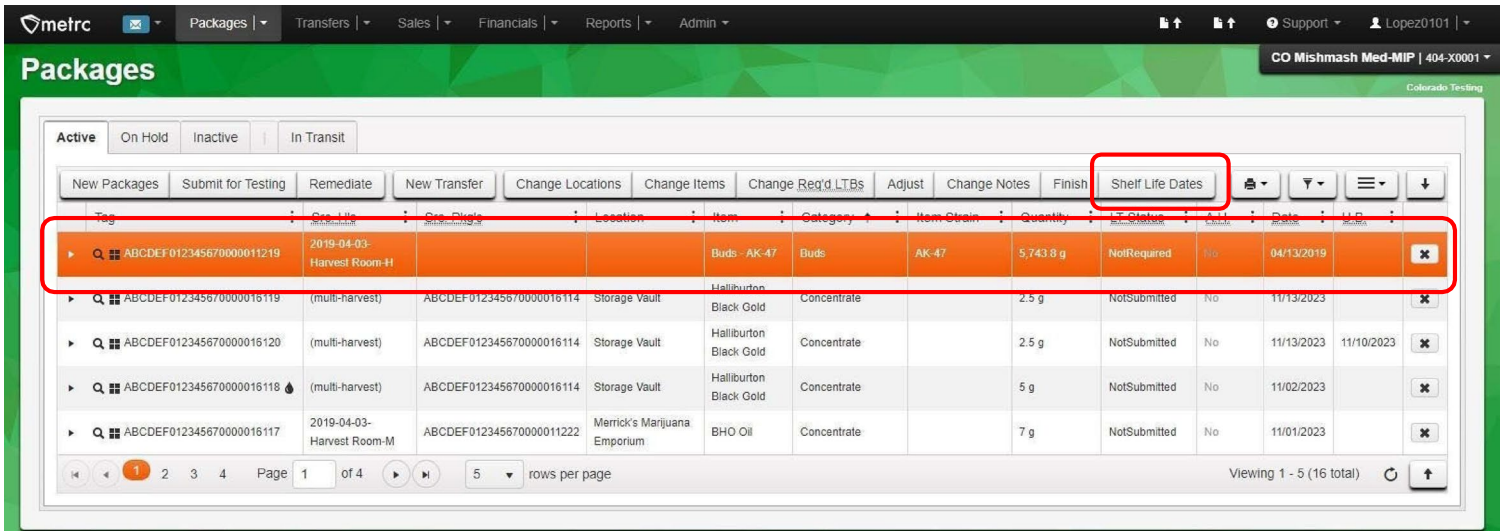

Figure 5: Edit Shelf-Life Dates button to edit Use by Date

This will open the Shelf Life Dates action window. Enter the new Use by Date for the package and select the green Submit Shelf-Life Dates button to save and update the Use by Date on the package - **see Figure 6.**
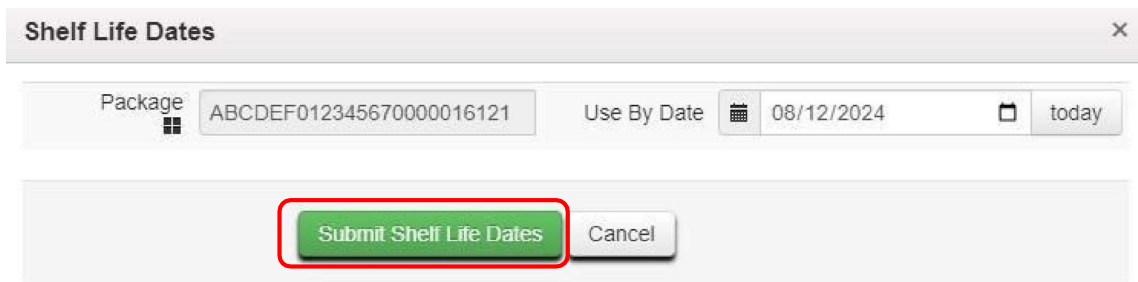

Figure 6: Shelf-Life Dates action window

Note: Within Metrc functionality, "Shelf Life Date" is interchangeable with "Use by Date" and expiration dates in accordance with MED regulations.

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Coming Soon: When a product is sold past its Use by Date via a sales receipt or sales delivery, Metrc will produce a notification upon the sale being recorded that the item is past the Use by Date. The notification will be visible within the blue Metrc envelope - **see Figure 7.**
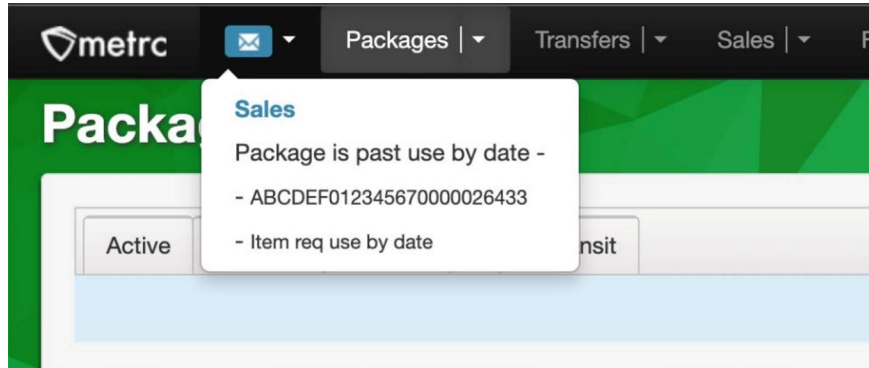

Figure 7: Sale made past Use by Date notification

Note: If using a Third Party Point of Sale system to perform sales, check with your Third Party Integrator to see what type of notification you will receive if a package were to be sold past the Use by Date.

Metrc Reports with Use by Date

The additional data provided with the Use by Date functionality has been added as a column within the following reports - **see Figure 8.**

- Package Sales
- Inventory Point in Time
- Packages Inventory

Figure 8: Example report with new Use by Date column

Use by Date Field: Colorado Only

The Use by Date for a package will be directly associated with the unique package label when creating a new package via the API. The endpoint that will be impacted by this change is: *POST/packageslv2/* and *POST/packageslv1/create* - **see Figure 9.**

```
Example Request
POST /packages/v2/?licenseNumber=123-ABC
[
  {
    "Tag": "ABCDEF012345670000020201",
    "Location": null,
    "Item": "Buds",
    "Quantity": 16.0,
    "UnitOfMeasure": "Ounces",
    "PatientLicenseNumber": "X00001",
    "Note": "This is a note.",
    "IsProductionBatch": false,
    "ProductionBatchNumber": null,
    "IsDonation": false,
    "IsTradeSample": false,
    "ProductRequiresRemediation": false,
    "UseSameItem": false,
    "ActualDate": "2015-12-15",
    "ExpirationDate": null,
    "SellByDate": null,
    "UseByDate": null,
    "Ingredients": [
      {
        "Package": "ABCDEF012345670000010041",
        "Quantity": 8.0,
        "UnitOfMeasure": "Ounces"
      },
```

Figure 9: Use by Date within Creating a Package

Please Note: In the case that an integrator omits sending a Use by Date with the newly created package, Metrc will automatically apply a date that is 9 months from either the Harvest Batch or Production Batch date depending on whichever is most recent.

To determine if a specific item requires a Use by Date, new fields have been added to the *GET/items/v#/active* endpoint that will indicate whether or not the Item, when associated with a package, will require a Use by Date - **see Figure 10** below.

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Example Request

```
GET  / i tems/v2/ active ?licenseNumber=123-AE!C&lastModi f ied5tart=2018-01-17T06:
```

Example Response

```
"Data": (
  {
    "Id":  1,
    "Name": "Buds",
    "ProductCategoryName":  "Buds",
    "ProductCategoryType": "Buds",
    "lsExpirationDateRequired":  false,
    "IsSellByOateRequired":  false,
    " sUseByDateRequired": false
    "QuantityType": "WeightBased",
    "DefaultlabTestingState":  "AwaitingConfirmation",
    "UnitOfMeasureName": "Ounces",
    "ApprovalStatus":  "Approved",
    "ApprovalStatusOateTime":  "0001-01-01T00: 00:00+00:00",
    "Strainid":  1,
    "StrainName": "Spl"ing Hill  Kush",
    "IternBrandid":  0,
    "IternBrandName..: null,
    "AdministrationHethod":  null,
    "UnitCbdPercent":  null,
    "UnitCbdContent":  null,
    "UnitCbdContentUnitOfMeasureNane":  null,
    "Uni tCbdContentDose": null,
    "Uni tCbdContentDoseUnitOfMeasureHame":  null,
    "UnitThcPercent":  null,
    "UnitThcContent":  null,
    "Uni tThcContentUnitOfMeasureNar,e":  null,
    "UnitThcContentOose":  null,
    "Uni tThcContentDoseUni tOfMeasureName":  null,
    "Uni tVolume":  null,
```

Figure 10: Example of Retrieving an Item

All GET package endpoints have been updated to return the Use by Date value when associated with a Package Label - **see Figure 11** below.

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Example Request

```
GET /packages/v2/active?licenseNumber=123-ABC&lastModified
```

Example Response

```
{
  "Data": [
    {
      "Id": 2,
      "Label": "ABCDEF012345670000010042",
      "PackageType": "Product",
      "SourceHarvestCount": 0,
      "SourcePackageCount": 0,
      "SourceProcessingJobCount": 0,
      "SourceHarvestNames": null,
      "SourcePackageLabels": null,
      "LocationId": null,
      "LocationName": null,
      "LocationTypeName": null,
      "Quantity": 1.0,
      "UnitOfMeasureName": "Ounces",
      "UnitOfMeasureAbbreviation": "oz",
      "PatientLicenseNumber": null,
      "ItemFromFacilityLicenseNumber": null,
      "ItemFromFacilityName": null,
      "Note": null,
      "PackagedDate": "2014-11-29",
      "ExpirationDate": null,
      "SellByDate": null,
      "UseByDate": null,
      "InitialLabTestingState": "NotSubmitted",
      "LabTestingState": "NotSubmitted",
      "LabTestingStateDate": "2014-11-29",
```

Figure 11: Example of Retrieving a Package

In the event a package needs to have its Use by Date updated, a new endpoint *PUT lpackages/v2/usebydate* has been created to enable integrators the ability to update the Use by Date on a package within a licensee's inventory - **see Figure 12**.

Example Request

```
PUT /packages/v2/usebydate?licenseNumber=123-ABC
[
  {
    "Label": "ABCDEF012345670000010041",
    "ExpirationDate": "2015-11-15",
    "SellByDate": "2015-11-15",
    "UseByDate": "2015-12-15"
  },
  {
    "Label": "ABCDEF012345670000010042",
    "ExpirationDate": "2015-11-15",
    "SellByDate": "2015-11-15",
    "UseByDate": "2015-12-15"
  }
]
```

Figure 12: Example of Updating a Package Use by Date

Metrc Resources

If you have any questions, or need additional support, the following resources are available:

Contact Metrc Support
By using the new full-service system by navigating to Support.Metrc.com, or from the Metrc System, click Support and navigate to support.metrc.com and it will redirect to the portal.

Please note: If accessing the portal for the first time, a username (which is established when logging in), the respective state and "Facility license number", and a valid email to set a password is required.

Metrc Learn
Metrc Learn has been redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Accessing the new Metrc Learn LMS is simple through multiple convenient locations:

From within the Metrc system
Navigate to the Support area dropdown on the navigational toolbar and select "Sign up for Training" to register.

From the Metrc website
Navigate to your state's partner page and scroll down to the "Metrc's Training Resources" section to find the link.

Also, save the link – learn.metrc.com – as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

Access additional resources
In the Metrc system, click on the Support area dropdown on the navigational toolbar and select the appropriate resource, including educational guides, manuals, and more.

Thank you for your continued partnership.

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