Metrc Support Bulletin

Bulletin Number: CO_IB_11.26.2024_Use by & Expiration Dates, Transfer Signatures & COA Requirements	**Distribution Date:** 11/26/2024	**Effective Date:** 12/04/2024
Contact Point: Metrc Support	**Subject:** Use by & Expiration Dates, Transfer Signatures & COA Documentation Requirements	
Reason: Updates regarding packaging, transfer, and laboratory test documentation requirements.		

Greetings,

Metrc, in collaboration with the Colorado MED, would like to share important updates regarding packaging requirements, transfer signature requirements, and laboratory test documentation going into effect on December 4, 2024.

Use by Date

The Use by Date feature has been available since December 15, 2023, and became mandatory for new packages as of January 1, 2024. This functionality allows industry users to assign a Use by Date to a package at the time of creation or while the package is active. For detailed information, please refer to Bulletin: CO_IB_05.24.2024 Use By Date Revised.

Upcoming Expiration Date Requirement

Effective December 4, 2024, the ability to assign an Expiration Date to products will also be available in Metrc. Recording the Expiration Date will be required in Metrc for Vaporizer Delivery Devices and/or Pressurized Metered Dose Inhalers. As of December 4, 2024, Vaporizer Delivery Devices and Pressurized Metered Dose Inhalers will appear as new categories in Metrc. Any Product Manufacturer licensee creating these products must select the accurate category for those Production Batches at that time. Vaporizer Delivery Devices and Pressurized Metered Dose Inhalers created before December 4, 2024, can maintain their current category designation and do not need to be updated.

Note: Previously**,** Product Manufacturer licensees creating Production Batches of Vaporizer Delivery Devices and/or Pressurized Metered Dose Inhalers were required to enter those corresponding Expiration Dates as a Use by Date in the Inventory Tracking System, but as of December 4, 2024, you will be able to assign an Expiration date to these packages of those product types. The Use by Date field will no longer be applicable to Vaporizer Delivery Devices and/or Pressurized Metered Dose Inhalers.

COA Upload Functionality

The Certificate of Analysis (COA) upload functionality was available optionally to Testing Facilities starting May 31, 2024 and remains optional until December 4, 2024. Effective December 4, 2024, all lab tests will require a COA to be uploaded to Metrc.

For additional information, please refer to Bulletin CO_IB_05/13_COA Upload Availability.

Change to Signature Requirements for Metrc Transportation Manifests

Effective December 4, 2024**,** signatures will no longer be required (physically or digitally) for Metrc Transportation Manifests. This update simplifies the process of product transfers, streamlining operations for all licensed facilities, and aims to enhance efficiency and reduce administrative burdens.

Please note that while development work is planned to remove the applicable signature fields and content acknowledgments from the Metrc Transportation Manifest, those changes to the Manifest template will not be immediately available.

Licensees must continue to acknowledge receipt of the transfer and product(s) by accepting the transfer within Metrc. By doing so, the licensed employee acknowledges full responsibility for the transfer and its accuracy, as well as the handling of any discrepancies or rejected items. Licensees may also continue to sign Manifests, if they elect to do so, until the revised Manifest template is available.

Please read on for detailed information regarding this new functionality.

Expiration Dates

Similar to the Use by Date, the Expiration Date is assigned to Vaporizer Delivery Devices and/or Pressurized Metered Dose Inhalers at the package level. When creating a new package, access the Packages area on the navigational toolbar. Once on the Packages grid, click the Active tab. Then select the package being pulled from to make the new package on the grid and click the New Packages button - **see Figure 1.**
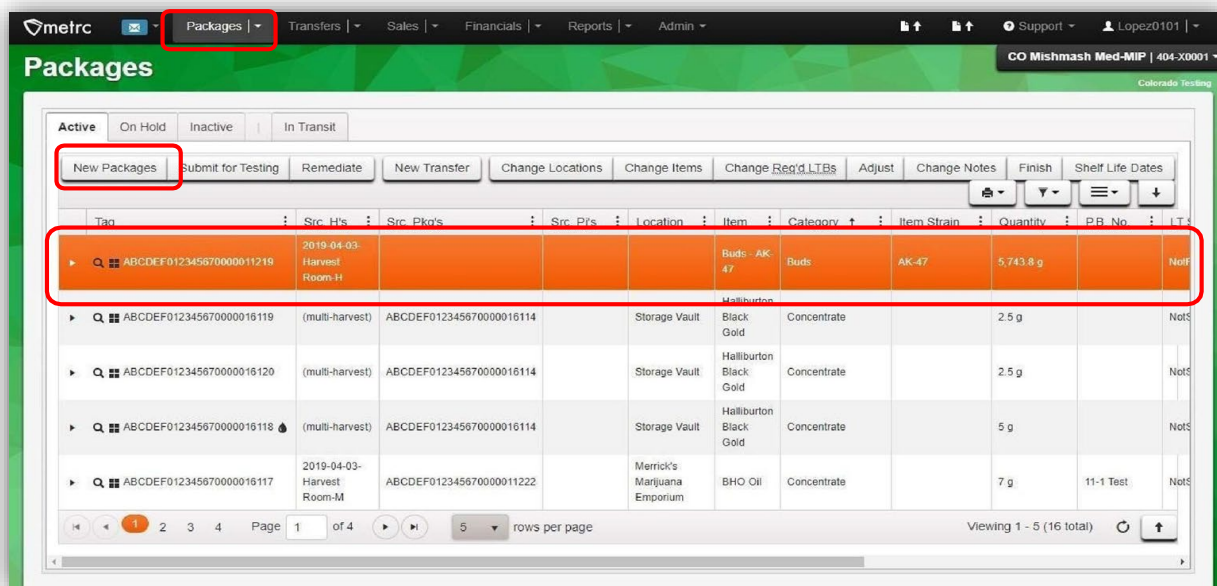
Figure 1: Accessing the New Package action window via the Packages grid

This will open the New Packages action window to enter the necessary package information, following the existing process for creating a new package. After an Item has been selected within the Item field in the action window, a new field will populate to allow the user to enter the Expiration Date. Any new package marked with the Same Item box will carry the same Expiration Date as the source package until a production batch event occurs. At that point, the package will carry the newly entered date or the newly triggered default date, which is 3 months from the production batch creation date.

The blue checkbox to the right of the Expiration Date field can be selected to auto populate the expiration date associated with Vaporized Delivery Devices and/or Pressurized Metered Dose Inhalers, using the State-configured default number of days.

The populated Expiration date will be editable as needed. Once all the information has been entered appropriately, select the green Create Packages button - **see Figure 2 below.**

**Figure 2: Expiration Date Field**

Once the new package has been created, it will appear in the Packages grid under the Active tab. An Expiration Date (Exp.) column has been added to the Packages grid, which is also sortable and filterable. If a product's expiration date is within 10 days, an orange box will be displayed around the expiration date in the corresponding column. Once a package reaches or surpasses its Expiration Date, then the package's font will be red as well as a red box around the Expiration Date indicating the product in the package is expired. - **see Figure 3 below**.

Figure 3: Expiration Date Column on the Packages Grid with Color Coding

Please note: Once a label with an expiration date has been affixed to a Container containing an Audited Product, a Licensee shall not alter that expiration date or affix a new label with a later expiration date. All expiration or use-by dates must be entered into the Inventory Tracking System prior to Transfer.

When a product has surpassed its Expiration Date, Metrc will produce a notification within the blue Metrc envelope - **see Figure 4.**
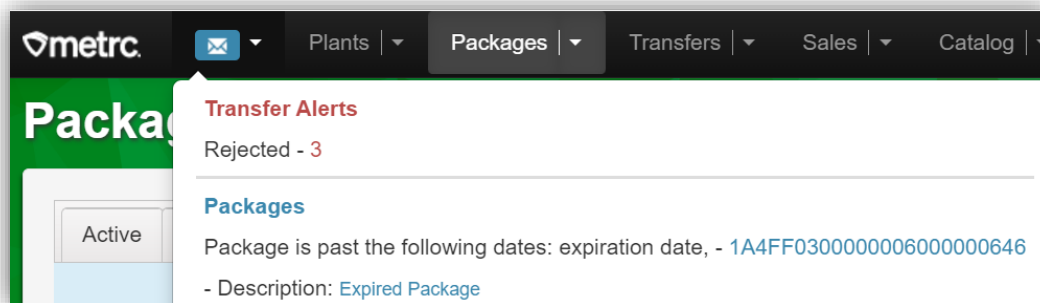
Figure 4: Expired Package Notification

Sales Note: If you use a Third-Party Point of Sale (POS) system to perform sales, check with your Third-Party Integrator to see what type of notification you will receive if a package is attempted to be sold past the Expiration Date.

Metrc Reports with Expiration Date

The additional data provided with the Expiration Date functionality has been added as a new column within the following reports - **see Figure 5 below**.

- Package Sales
- Inventory Point in Time
- Packages Inventory

Figure 5: Expiration Date Column in Reports

COA Uploads

Starting December 4, 2024, Testing facilities will be required to upload Certificates of Analysis (COAs) to Metrc.

Once a Testing Facility has uploaded/imported test results and the COA into Metrc, the test results will show in the Lab Results tab of the test sample package and the source package that the test sample was pulled from. The COA can be downloaded to be viewed and/or printed by selecting the [Doc] button in the Lab Results tab - **see Figure 6**.

Figure 6: Selecting Doc button to download COA

Viewing COA from Transfer/Manifest Grid

When a COA has been uploaded by a testing facility, then it is available to be downloaded within the Transfers grid in Metrc when a package is being manifested. To download the COA, go to the Transfers area on the navigational area, then select the Licensed option from the dropdown. Click the Incoming tab from the Transfers grid. Select the arrow to the left of the transfer manifest, click the Destinations tab to reveal the packages on the manifest and select the arrow to the left of the

package. Then click the Lab Results tab and the [Doc] button can be seen to the far right of the test results in the last column to download a pdf version of the COA - **see Figure 7 below.**

Figure 7: Selecting the Doc button to download the COA

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 you 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 are 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.