

<b>Bulletin Number:</b> CO_IB_11.26.2024_Use by & Expiration Dates, Transfer Signatures & COA Requirements	<b>Distribution Date:</b> 11/26/2024	<b>Effective Date:</b> 12/04/2024
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> Use by & Expiration Dates, Transfer Signatures & COA Documentation Requirements	
<b>Reason:</b> 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 Metric.

For additional information, please refer to Bulletin [CO IB 05/13 COA Upload Availability](#).

### Change to Signature Requirements for Metric Transportation Manifests

Effective December 4, 2024, signatures will no longer be required (physically or digitally) for Metric 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.

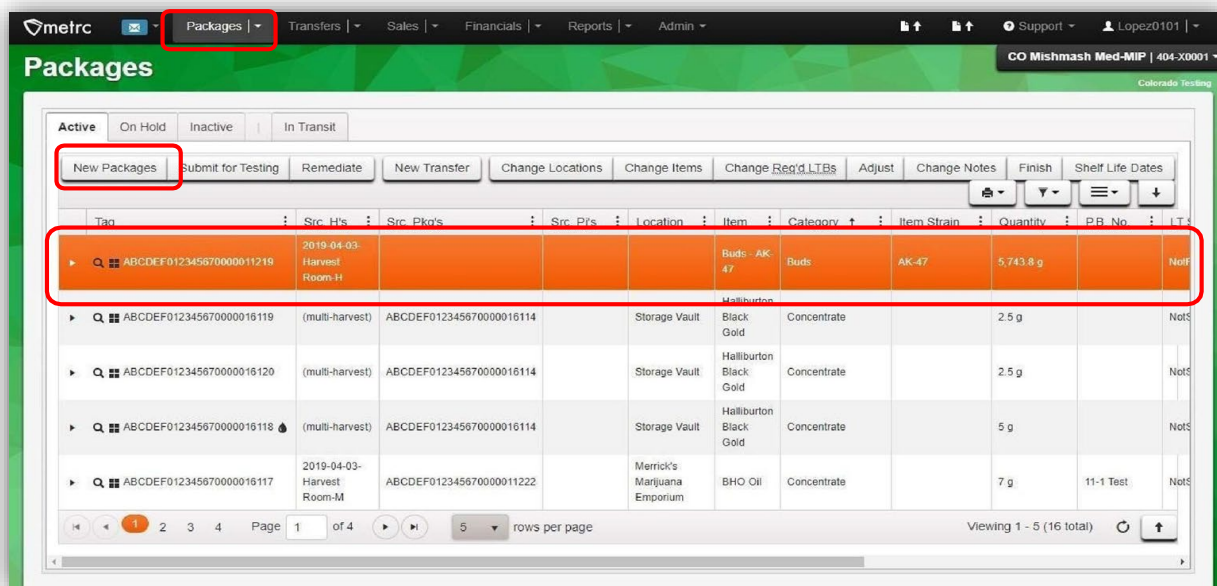
Please note that while development work is planned to remove the applicable signature fields and content acknowledgments from the Metric Transportation Manifest, those changes to the Manifest template will not be immediately available.

**Licensees must continue to acknowledge receipt of the transfer and product(s) by accepting the transfer within Metric.** 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**.

New Packages

New Package # 1 (clear)

New Tag: ABCDEF012345670000016761

Location: Storage Vault

Item: Vape Cart - Pumpkin Pie - 1g

Quantity: 10 Grams Max

Package # 1: ABCDEF012345670000016760

Item: Vape Cart - Pumpkin Pie - 1g

Current Lab Testing State: Test Passed

Quantity: 10 Grams Max

Packaging - new total will be 0 g

Quick Entry: Quick entry packages OFF

Package Date: 10/31/2024 today

**Expiration Date: 09/28/2025 ✓**

Use-By Date: 06/28/2025 ✓

Product Requires Remediation

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When the selected Item has a configured Shelf Life Date (Expiration Date, Sell By Date, Use By Date):

- When the new Package is a Production Batch or Opening Balance Package:
  - The new date will be calculated based on the new packaged date and the configured number of days\*.
- Otherwise:
  - If at least one ingredient (source) Package has the Shelf Life Date, this date is inherited.
  - If none of the ingredient (source) Packages has the Shelf Life Date, then a new date will be calculated based on the ingredient packaged date and the configured number of days.
  - For both cases, if more than one ingredient package meets the condition, then the most restrictive date is used in the calculation.

\*Configured number of days in the Item Category.

Create Packages Cancel

Figure 2: Expiration Date Field

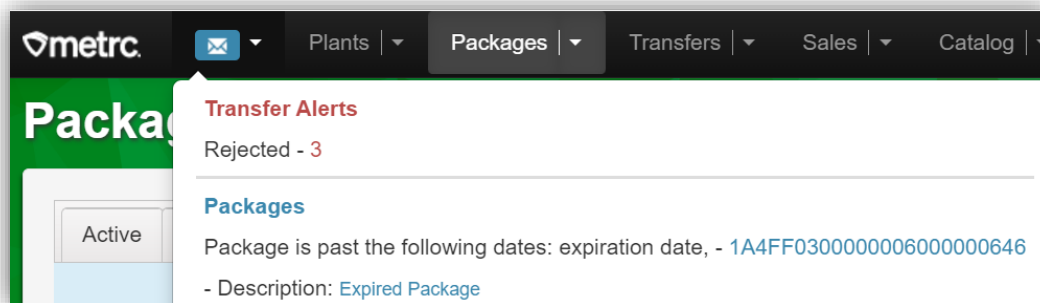
Once the new package has been created, it will appear in the Packages grid under the Active tab. An Expiration Date (Exp.) column has been added to the Packages grid, which is also sortable and filterable. If a product's expiration date is within 10 days, an orange box will be displayed around the expiration 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.

Tag	Category	Quantity	Date ↓	Exp. ↓	U.B.
ABCDEF012345670000016760	Concentrate	10 g	10/31/2024	09/28/2025	06/28/2025
ABCDEF012345670000016745	Concentrate	1 g	04/09/2024	11/01/2024	11/01/2024
ABCDEF012345670000016744	Concentrate	1 g	04/09/2024	10/31/2024	10/24/2024
ABCDEF012345670000016746	Concentrate	1 g	04/09/2024	10/31/2024	10/03/2024

**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, Metric will produce a notification within the blue Metric 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.

### **Metric 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

Package	Harvest	Source Packages	Item	Category	Location	Location Type	Patient	Quantity	Manifest	P.B.	Prod. Batch No.	Lab Testing	A.H.	Exp. Date
ABCDEF01234567000015174	Red Runtz 022422	ABCDEF01234567000015183	Red Runtz Buds	Buds	Sales Floor	Default Location Type		50 g	0000013301	No		TestPassed	No	
1A4FF03000000005000000329		ABCDEF01234567000015443	Joe's Brownies 50mg	Infused Edible	Sales Floor	Default Location Type		49 ea		No		TestPassed	No	10/25/2025
1A4FF03000000005000000324		ABCDEF01234567000015444	Test Weight Concentrate	Test Concentrate Weight	Sales Floor	Default Location Type		0.0000 g		Yes	Testing123	TestPassed	No	
1A4FF03000000005000000325		1A4FF03000000005000000324	Test Weight Concentrate	Test Concentrate Weight	Sales Floor	Default Location Type		1.0001 g		No		TestPassed	No	
ABCDEF01234567000015169	Red Runtz 022422	ABCDEF01234567000015183	Red Runtz Buds	Buds	Sales Floor	Default Location Type		1.98 g	0000013101	No		TestPassed	Yes	
ABCDEF01234567000015170	Red Runtz 022422	ABCDEF01234567000015183	Red Runtz Buds	Buds	Sales Floor	Default Location Type		3 g	0000011202	No		TestPassed	Yes	
ABCDEF01234567000015444		ABCDEF01234567000015440	Test Weight Concentrate	Test Concentrate Weight	Vault	Default Location Type		13.9930 g		No		TestPassed	No	
ABCDEF01234567000015442		ABCDEF01234567000015440	MetrC 10 Vape Cartridge	Concentrate (Each)	Test MMD HHMM	Default Location Type		0 ea		No		TestPassed	No	07/08/2024

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 button in the Lab Results tab - see Figure 6.

Test Date	Overall	Test Name	Test Passed	Result	Notes	Released Date	Sample Package	Item	Category
03/04/2022	Passed	Total THC %	Passed	9.89		03/04/2022 09:44 am	ABCDEF012345670000015956	David's New Buds	Buds
03/04/2022	Passed	Total CBD %	Passed	0.02		03/04/2022 09:44 am	ABCDEF012345670000015956	David's New Buds	Buds

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 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.

The screenshot shows a software interface with a table of lab results. The table has columns for Test Date, Overall, Test Name, Test Passed, Result, Notes, Released Date, Sample Package, Item, and Category. Three rows of data are visible, all with a 'Passed' status. A red box highlights the 'Lab Results' tab at the top of the table, and another red box highlights the 'Doc' button in the rightmost column of the second row.

Test Date	Overall	Test Name	Test Passed	Result	Notes	Released Date	Sample Package	Item	Category	Doc
03/14/2022	Passed	Aflatoxin B1 (ppb) Infused Edible (Capsule Only)	Passed	0		03/14/2022 04:05 pm	ABCDEFO12345670000016146	Caramel Bites	Infused Edible	Doc
03/14/2022	Passed	Aflatoxin B2 (ppb) Infused Edible (Capsule Only)	Passed	0		03/14/2022 04:05 pm	ABCDEFO12345670000016146	Caramel Bites	Infused Edible	Doc
03/14/2022	Passed	Aflatoxin G1 (ppb) Infused Edible (Capsule Only)	Passed	0		03/14/2022 04:05 pm	ABCDEFO12345670000016146	Caramel Bites	Infused Edible	Doc

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](https://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.