

Bulletin Number: 099	Distribution Date: 12/22/2021	Effective Date: 1/01/2022
Contact Point: api-info@metrc.com	Subject: Item Category and Patient Limits Process Update	
Reason: Metrc® is providing guidance on new item category and sales requirements to support implementation of Colorado legislation.		

Greetings Metrc Integration Providers,

The MED and Metrc are providing details regarding the development of functionality and new requirements to support implementation of Colorado legislation. As an initial step, item category configuration changes are needed to allow the system to effectively identify potential discrepancies in daily authorized quantity limits and THC potency authorizations as required by legislation.

Metrc will be providing support of these changes through the Application Programming Interface (API) for Third Party Vendors (TPVs) to update the category changes going into effect.

Effective immediately, the MED has updated certain Item Categories to support the capturing of related information. Licensees will be able to update their existing items within the following categories below to include THC%, Unit Weight, and/or Unit THC Content. All new items created, will be prompted with these requirements before the item is stored in Metrc.

This does not impact all categories. For example, categories such as wet whole plants, bud allocated for extraction, and immature plants are not impacted by these changes.

Category	Updates Required
Buds	THC %
Concentrate	THC %
Concentrate (Each)	THC % and Unit Weight
Infused (edible)	THC Content
Infused (non-edible)	THC Content
Shake/Trim	THC %
Shake/Trim (by strain)	THC %

Additional updates are being made on January 1st to support changes to the Patient Memberships, Patient Sales/Deliveries, and Patient Limit tracking process.

Please see the following pages for more information on these changes.

Editing Existing Item and Adding New Item with New Category Requirements

Licensees will be able to update their existing items within the following categories to include Unit THC Content, Unit Weight, or THC %.

If licensees do not update existing items that have been associated to packages and transferred, then a Medical Store will need to enter that information for the item when reporting a sale. **Please note that once an item has been updated by the originating facility who originally created it, then all item details will automatically be updated to any associated packages with that item.**

Category	Updates Required
Buds	THC %
Concentrate	THC %
Concentrate (Each)	THC % and Unit Weight
Infused (edible)	THC Content
Infused (non-edible)	THC Content
Shake/Trim	THC %
Shake/Trim (by strain)	THC %

To update existing items within these categories, integrators should use the **POST /items/v1/update** for their licensed businesses they are partnering with. To create new items within these categories, integrators should use **POST /items/v1/create**. **The Colorado Sandbox has been updated to reflect these category changes.**

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 daily limit is based on the values below**
 - **Two (2) ounces of marijuana flower is equal to:**
 - **20,000 mg or 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 THC, and 8 grams of concentrate would also deduct from the available amount to purchase.

Flower and Concentrate 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 or Concentrate 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 as the quantity limits for each patient are dependently linked to one another.

Category	Equivalency
Buds	Recognized as Marijuana Flower
Shake/Trim	Recognized as Marijuana Flower
Shake/Trim (by strain)	Recognized as Marijuana Flower
Concentrate	Recognized as Marijuana Concentrate
Concentrate (Each)	Recognized as Marijuana Concentrate

The THC Available is based on the Unit THC Content of the medical marijuana infused within the item. Meaning an edible with 20,000mg of Unit THC Content would deduct the equivalency of two ounces of marijuana flower or eight grams of marijuana concentrate from the patient limits.

Category	Equivalency
Infused (edible)	Recognized as Marijuana Infused Products
Infused (non-edible)	Recognized as Marijuana Infused Products

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 to purchase a different limit than the standard setting, then that must be reflected within the patient membership for those amounts to be reflected.**

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 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.

POST /patients/v1/add

```
[
  {
    "LicenseNumber": "12-345-678-AA",
    "LicenseEffectiveStartDate": "2015-06-21",
    "LicenseEffectiveEndDate": "2022-06-15",
    "RecommendedPlants": 6,
    "RecommendedSmokableQuantity": 2.0,
    "FlowerOuncesAllowed": 2,
    "ThcOuncesAllowed": .7054,
    "ConcentrateOuncesAllowed": .2821,
    "InfusedOuncesAllowed": null,
    "MaxFlowerThcPercentAllowed": 35,
    "MaxConcentrateThcPercentAllowed": 75,
    "HasSalesLimitExemption": false,
    "ActualDate": "2015-12-15"
  },
]
```

POST /patients/v1/update

```
[
  {
    "LicenseNumber": "12-345-678-AA",
    "NewLicenseNumber": null,
    "LicenseEffectiveStartDate": "2015-06-21",
    "LicenseEffectiveEndDate": "2022-06-15",
    "RecommendedPlants": 7,
    "RecommendedSmokableQuantity": 2.0,
    "FlowerOuncesAllowed": 3,
    "ThcOuncesAllowed": 1,
    "ConcentrateOuncesAllowed": .5,
    "InfusedOuncesAllowed": null,
    "MaxFlowerThcPercentAllowed": 35,
    "MaxConcentrateThcPercentAllowed": 75,
    "HasSalesLimitExemption": false,
    "ActualDate": "2015-12-15"
  },
]
```

New Patient Lookup Endpoint

Metrc will be enabling the GET/patients/v1/statuses/{PatientLicenseNumber} endpoint.

Documentation will be found at the following address under **Patient Status** <https://api-co.metrc.com/documentation>.

When POS systems use this endpoint, the MED expects that the following best practices will be utilized;

- Licensees & Integrators **MUST** remember to enable the user permission to utilize this endpoint, ensure the user has the Lookup Patients permission enabled within Metrc.
- Integrators should be performing two API **“Calls”**, at minimum, one prior to sale and then another after the sale to confirm.
- If Integrators would like to perform a reconciliation on all Patients/Sales at a Dispensary, it should be done after business hours.
- All sales transactions are required to perform a “GET” on dispensing amount available to the patient prior to the sale being made.
- ***Please note that data returned by this endpoint is cached for up to one minute.***

This functionality has been added to assist dispensaries with controlling and proper administration of dispensing of product to patients.

The following is the Patient Status Lookup endpoint will be **GET** **/patients/v1/statuses/{patientLicenseNumber}**.

User Permission Required: **Lookup Patients**

Parameters: **licenseNumber**: The license number of the facility for which to return the list of active patients.

Example Request:

GET /patients/v1/status/12-123-456-AA?licenseNumber=123-ABC

Example Response

```
{
  "PatientLicenseNumber": "12-123-456-AA",
  "FlowerOuncesAvailable": 2.0,
  "ThcOuncesAvailable": .7054
  "ConcentrateOuncesAvailable": 0..2821,
  "InfusedOuncesAvailable": 0.0,
  "PurchaseAmountDays": 1.0
}
```

This functionality will help the dispensaries ensure product is not over dispensed at one or multiple locations. For integrators that work in other jurisdictions, the Flower and THC ounces available will function similarly to how they do today where patient limits are applied. The Concentrate ounces available will reflect the weight of the Concentrate items sold. The Infused ounces available will not be used in Colorado or any instances in Metrc at this time.

Sales with New Category Requirements

The updates being made to the existing categories are intended to assist Medical Store licensees in identifying 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 1** 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 items by January 1st, there will still be the ability for the Medical Store licensee to input that information to mitigate any items from being sold to a patient within the licensees existing inventory.

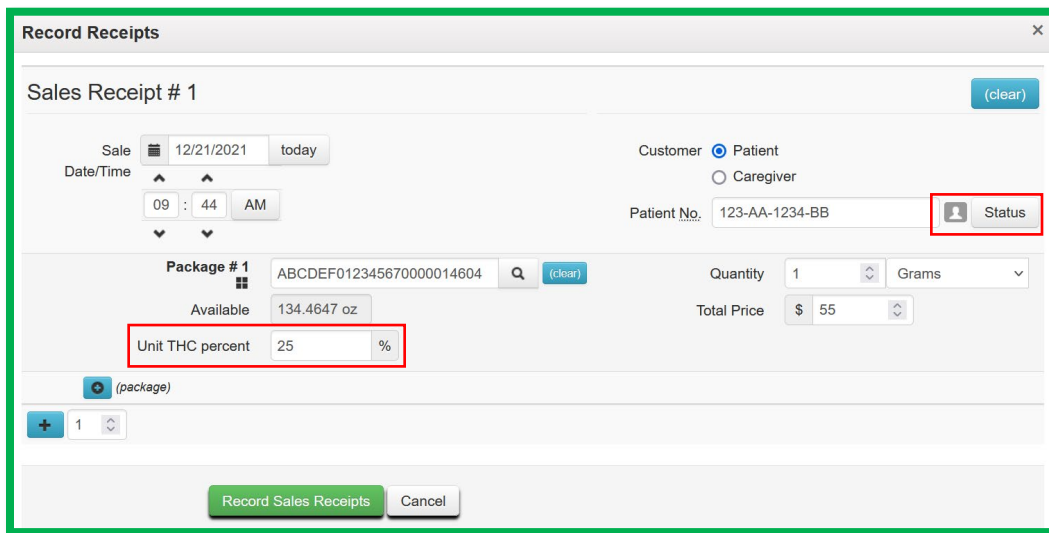


Figure 1: Example Sales Receipt Dialog Box

Example API Request

```
POST /sales/v1/receipts?licenseNumber=123-ABC
[
  {
    "SalesDateTime": "2021-12-04T16:47:24.000",
    "SalesCustomerType": "Patient",
    "PatientLicenseNumber": "123-AA-1234-BB",
    "CaregiverLicenseNumber": null,
    "IdentificationMethod": null,
    "Transactions": [
      {
```

Metrc API Bulletin

```
"PackageLabel": "ABCDEF012345670000014604",  
"Quantity": 1.0,  
"UnitOfMeasure": "Grams",  
"TotalAmount": 9.98,  
"UnitThcPercent": 25,  
"UnitThcContent": null,  
"UnitThcContentUnitOfMeasure": null,  
"UnitWeight": null,  
"UnitWeightUnitOfMeasure": null  
  }  
] }  
]
```

Please note: The SalesDateTime field must be the actual date and time of the transaction without time zone. This date/time must already be in the same time zone as the Facility recording the sales. For example, if the Facility is in Pacific Time, then this time must be Pacific Standard (or Daylight Savings) Time and not in UTC. The Unit THC Percent, Content, or Weight can be null if the item has been updated within the package itself based on the category it is associated with.

Please contact api-info@metrc.com with any questions or concerns