

Bulletin Number: CO_IB_1.5.21	Distribution Date: 1/5/21	Effective Date: 1/1/21
Contact Point: Metrc® Support	Subject: Legislative Configuration Changes in Metrc	
Reason: Metrc is providing an update on our newest changes in the software based on the legislative changes that became available as of on January 1 st , 2021.		

Greetings Metrc Users,

Metrc is pleased to provide information on our newest configuration enhancements within the software that are currently available with the new MED rules that were effective on January 1st, 2021.

- All Retail Store types will now have the ability to record sales deliveries. The Metrc Admin for each respective license will see a new selectable Deliveries option beneath the Sales tab. Please remember: to conduct deliveries, the license *must* possess the appropriate permits from the MED.
- A new occupation has been enabled to allow for licensees to report if an employee is a “Designated Test Batch Collector”. Like the Manager-Approved Sample, to apply the this occupation to an employee; simply edit the employee profile and click the checkbox next to “Designated Test Batch Collector.”
- A new test type will be added to allow for testing facilities to record results for “Water Activity”. MED has informed Metrc that required Water Activity testing does not begin until July 1, 2021. MED requested that the test type be made available for testing facilities to record results in advance of the required date for licensees who wish to voluntarily conduct Water Activity tests on Test Batches prior to July 1, 2021.

Please find on the following pages a detailed description of the new configurations:

Software Update for Sales Deliveries

With the configuration change implemented for sales deliveries, any employee who needs access must be granted the permission by the Metric admin, or an employee who can update employee permissions. The permission will only be found within the **Sales Menu**.

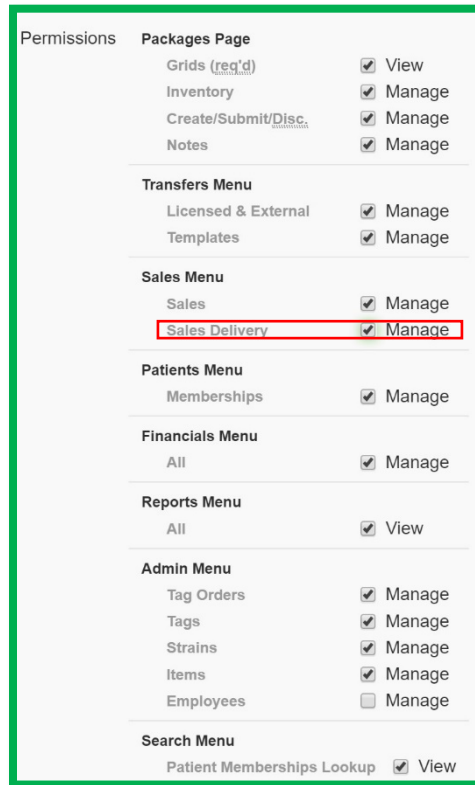


Figure 1: Employee Permissions

Once the permission is granted to a user, the sales delivery option can be found beneath the sales area on the navigation pane.

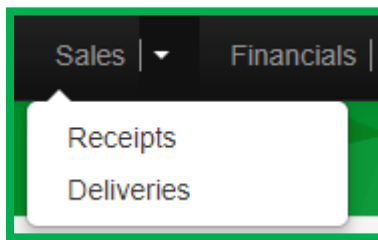


Figure 2: Selectable Sales Option

In Metrc, sales deliveries are reported differently than in-store sales receipts. Reporting a sales delivery as an in-store sales receipt within Metrc will not meet the regulatory requirements and may cause a sale to be reported twice. To differentiate the two, please see the following.

- Sales receipts would indicate the transaction took place within the licensed premise of the Medical or Retail facility.
- Sales delivery would indicate active inventory was taken off the facilities licensed premises and delivered to a consumer.
- All Retail Store's should never be recording the same transaction as a sales receipt and delivery.

Similar to a transfer manifest, prior to leaving a facility, a sales delivery manifest must be created to document the sales delivery will occur. When recording the necessary information within the sales delivery manifest, it is important to ensure the Consumer ID number and Recipient Name accurately reflect the information provided to the Retailer upon order. The Consumer ID field should capture the identification number from the identification that the consumer will use to prove their identity and age. For example, a driver license identification number. That information should be captured when the order is received.

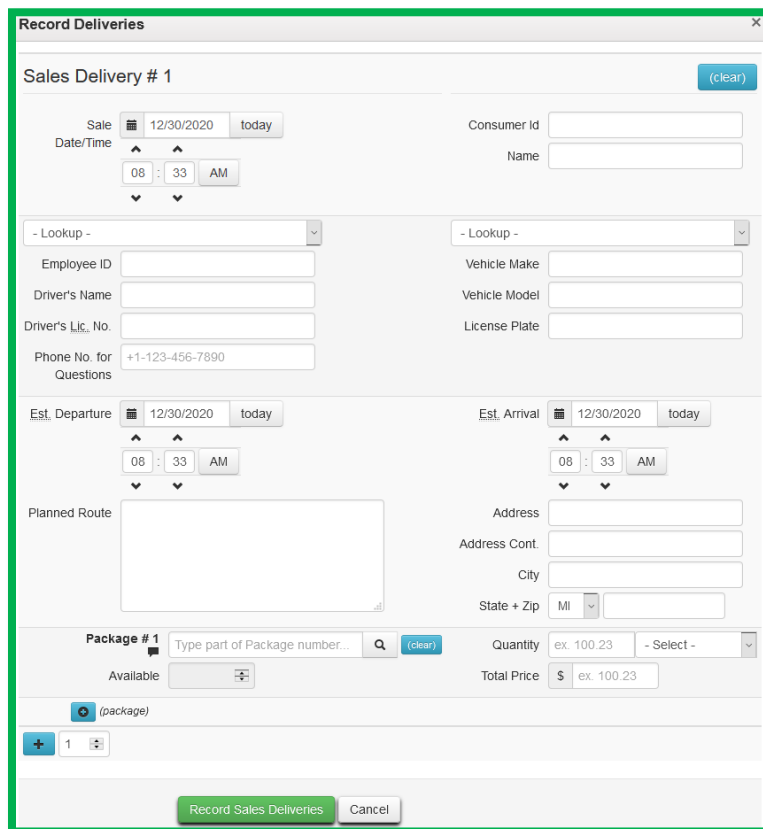


Figure 3: Recording Sales Deliveries

Each delivery to a consumer should be recorded separately. Once the sales delivery is recorded, it is considered open in Metrc. As you will see below, there is an Active and Inactive tab within the Sales Delivery Grid. Once a delivery has been completed it can no longer be edited after the “Complete” button is selected. If the delivery is still open, the employee can edit, or void as needed.

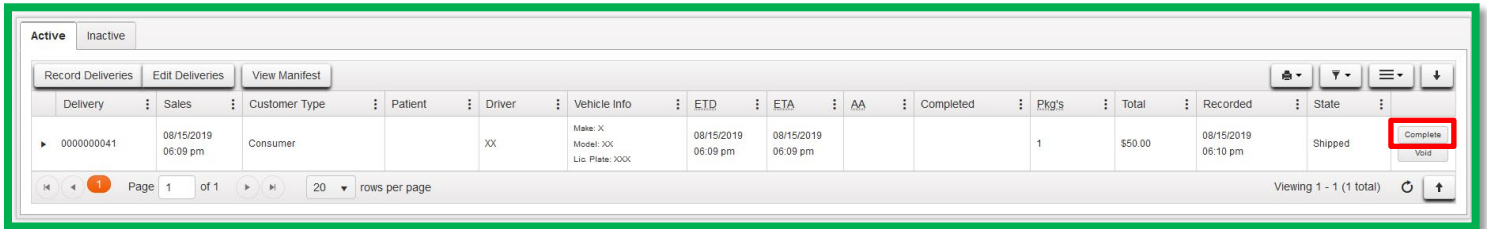


Figure 4: Sales Deliveries Grid

When a sales delivery is recorded in Metrc as “Complete”, the inventory is removed from the package and marked as a delivery. Remember, you should **NOT** report a “Sale Receipt” and a “Sale Delivery” for the same transaction. This will cause inventory to be removed from the affected package twice.

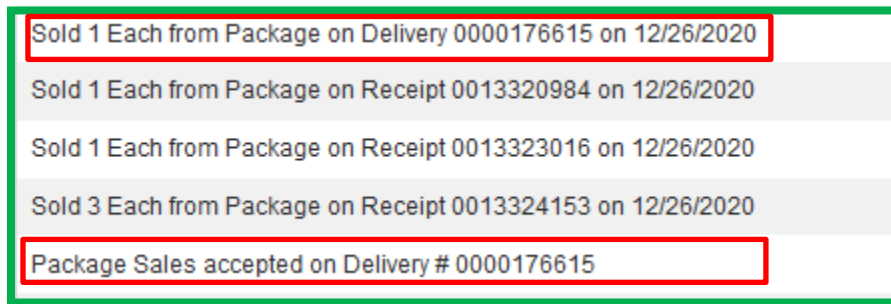


Figure 5: Packages History Example

Sales Deliveries API Impact

If a Retailer plans to report sales deliveries through their Point-of-Sale (POS) system, there are a few considerations Metrc would like to note. The sales delivery manifest can only be printed within your Metrc account. The Metrc API will allow for the creation/reporting of sales deliveries, but Retailers should ensure the following.

- Confirm with your POS provider that sales deliveries are being reported into Metrc as deliveries and not receipts.
- Log into Metrc prior to departure and print out the Metrc Sales Delivery manifest.
- Do not create both a sales delivery in Metrc manually and in your POS system separately as you will likely be recording the transaction twice.

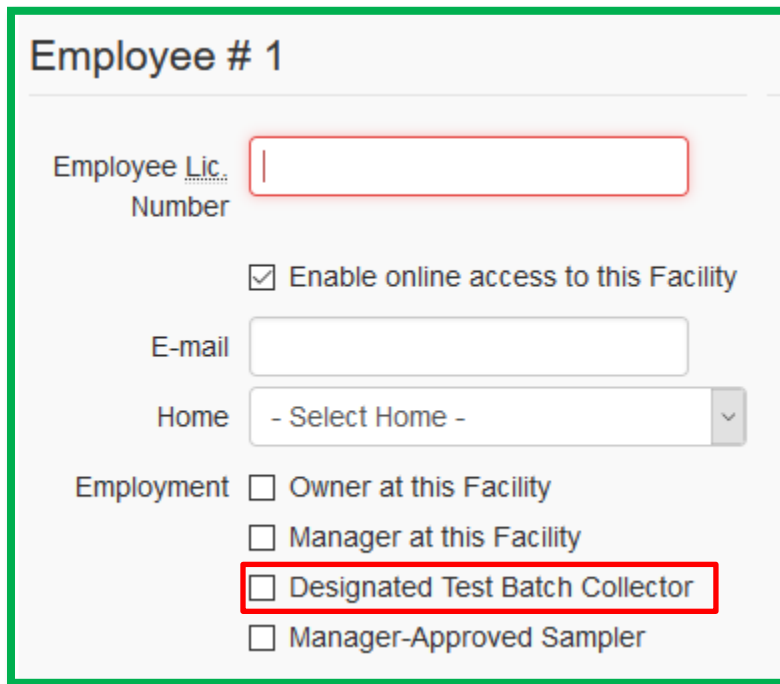
If your POS system does not currently differentiate between sales deliveries and receipts, your sales data may be reported inaccurately. Metrc provides documentation [here](#) for integrators to reference the new available endpoints for the sales section.

The new endpoints that will be available for POS systems to utilize the sales delivery section of the Metrc API are outlined below.

- POST /sales/v1/deliveries
- PUT /sales/v1/deliveries
- PUT /sales/v1/deliveries/complete
- DELETE /sales/v1/delivery/{id}

New Occupation: Designated Test Batch Collector

In order to comply with the new Designated Test Batch Collector requirements, a new identifier will be available within an Employee’s profile. If your facility will be assigning Designated Test Batch Collectors, an Admin with permissions for Employees will need to edit the assigned Employee’s profile and select “Designated Test Batch Collector”.



The screenshot shows a web form titled "Employee # 1". It contains several input fields and checkboxes. The "Employee Lic. Number" field is empty and highlighted with a red border. Below it is a checked checkbox for "Enable online access to this Facility". The "E-mail" field is empty. The "Home" field is a dropdown menu showing "- Select Home -". Under the "Employment" section, there are four checkboxes: "Owner at this Facility", "Manager at this Facility", "Designated Test Batch Collector" (highlighted with a red border), and "Manager-Approved Sampler".

Figure 6: Employee Occupations

New Test Type: Water Activity

A new test type will be added to allow for testing facilities to record results for “Water Activity” tests. MED has informed Metrc that required Water Activity testing does not begin until July 1, 2021. MED requested that the test type be made available for testing facilities to record results in advance of the required date for licensees who wish to voluntarily conduct Water Activity tests on Test Batches prior to July 1, 2021.

It will not be added as a Test Batch at this time, so it will not be included as a checkbox option when creating a test sample package. Testing Facilities will be able to choose Water Activity from the test type drill-down when reporting test results on sample packages in Metrc. Licensees should coordinate directly with the testing facility if they are looking to voluntarily have Water Activity testing conducted. As we approach the July 1, 2021 required testing date more information regarding the appropriate Test Batch selection will be provided.

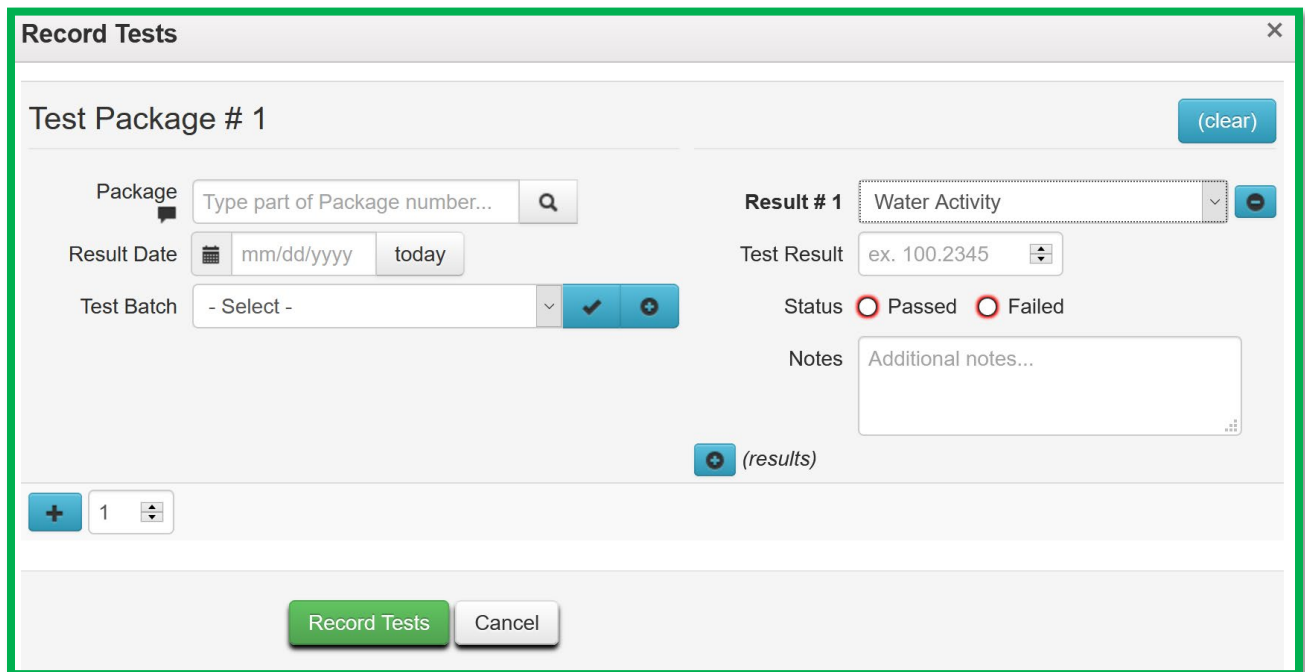


Figure 7: New Water Activity Test Type

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions.