Metrc Support Bulletin

Bulletin No: CO_IB_Use by Date	Distribution Date: 12/12/2023	Effective Date: 12/15/2023
Contact Point: Metrc® Support	Subject: Use by Date Functionality	
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 will be available starting 12/15/2023 and remain optional until 1/1/2024. Starting 1/1/2024 all newly created packages will require a Use by Date.

Please read on for detailed information regarding this new functionality.

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**.
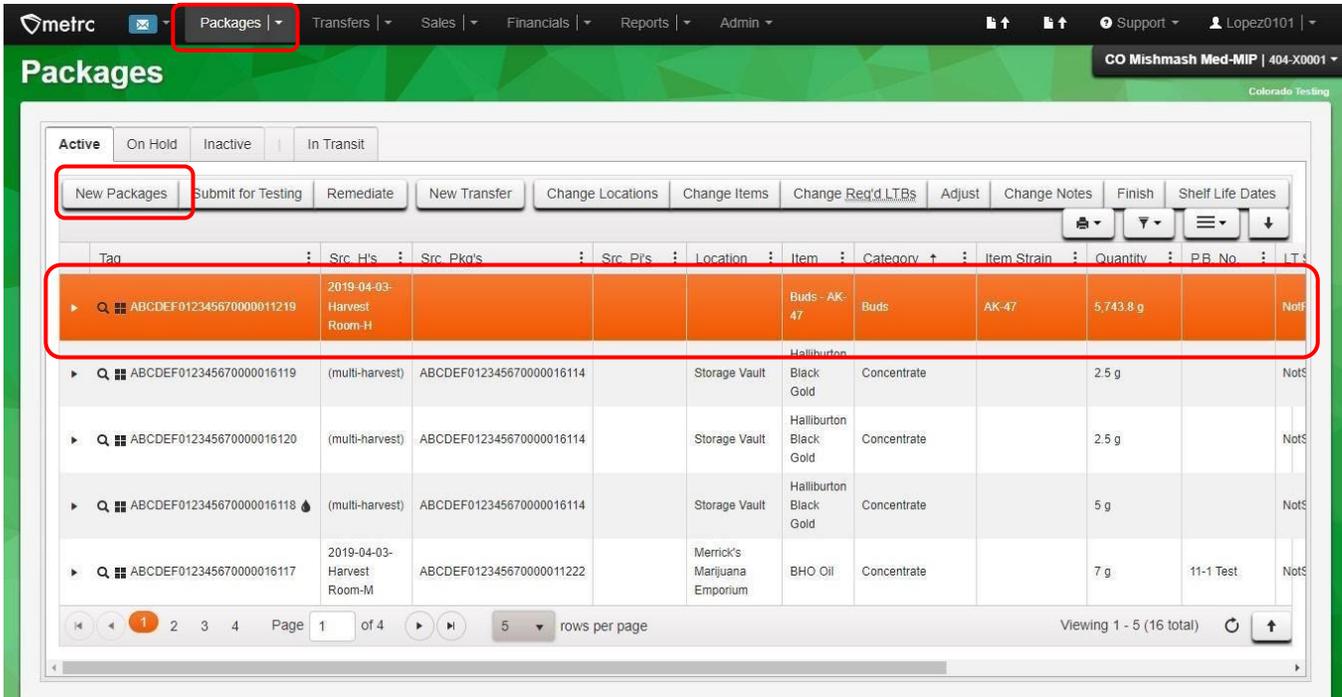

Figure 1: Accessing the New Package action window via the Packages grid

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.

After the new package is created, that package will appear in the Packages grid under the Active tab. A Use by Date column has been added to the Packages grid, and the column can be sorted and filtered. When a product is 10 days away from reaching its Use by Date, the package will become highlighted in orange. Once a package has reached or surpassed its Use by Date, there will be a red color indicator to highlight those packages – **see Figure 3** below**.**

	Tag	Src. H's	Src. Pkg's	Location	Item	Category	Item Strain	Quantity	U.B.
▶	🔍 ⊞ ABCDEF012345670000016119	(multi-harvest)	ABCDEF012345670000016114	Storage Vault	Halliburton Black Gold	Concentrate		2.5 g	07/15/2024
▶	🔍 ⊞ ABCDEF012345670000016120	(multi-harvest)	ABCDEF012345670000016114	Storage Vault	Halliburton Black Gold	Concentrate		2.5 g	11/26/2023
▶	🔍 ⊞ ABCDEF012345670000016121	2019-04-03-Harvest Room-H	ABCDEF012345670000011219	Storage Vault	Infused Pre-Rolls	Concentrate (Each)		350 ea	11/15/2023
▶	🔍 ⊞ ABCDEF012345670000016118 💧	(multi-harvest)	ABCDEF012345670000016114	Storage Vault	Halliburton Black Gold	Concentrate		5 g	12/04/2023
▶	🔍 ⊞ ABCDEF012345670000016114	(multi-harvest)	ABCDEF012345670000016112	Storage Vault	Halliburton Black Gold	Concentrate		0 g	11/17/2023
▶	🔍 ⊞ ABCDEF012345670000016116	(multi-harvest)	ABCDEF012345670000016115	Storage Vault	RSO	Concentrate (Each)		25 ea	05/15/2024

Figure 3: Use By Date Column on the Packages Grid

Edit Use by Date

The Use by Date can be edited by the user if needed. To change the Use by Date of a package, highlight the package in the grid and select the Shelf Life Dates button to access the Edit Shelf Life Dates action window – **see Figure 4**.
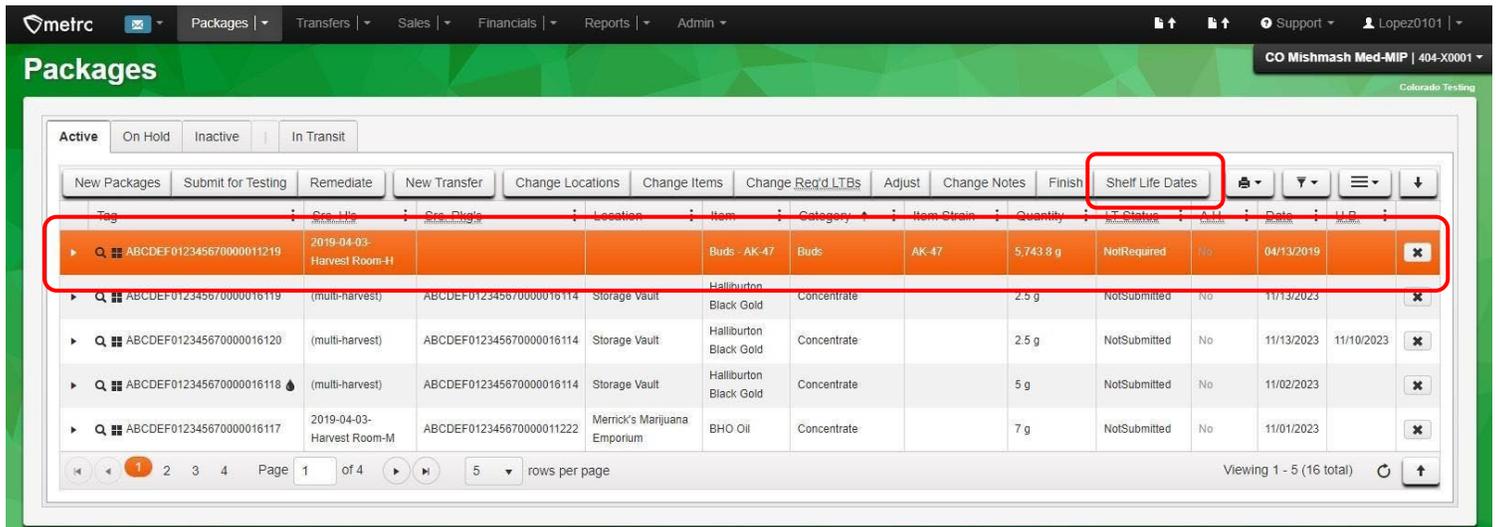

Figure 4: Edit Shelf Life Dates button to edit Use by Date

After clicking the Shelf Life Dates button, the user will see the Shelf Life Dates action window with an editable field for Use by Date. Enter the new Use by Date for the package and click the green Submit Shelf Life Dates button to save and update the Shelf Life Date – **see Figure 5.**

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

Figure 5: Shelf Life Dates action window

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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 Metrc envelope – **see Figure 6**.
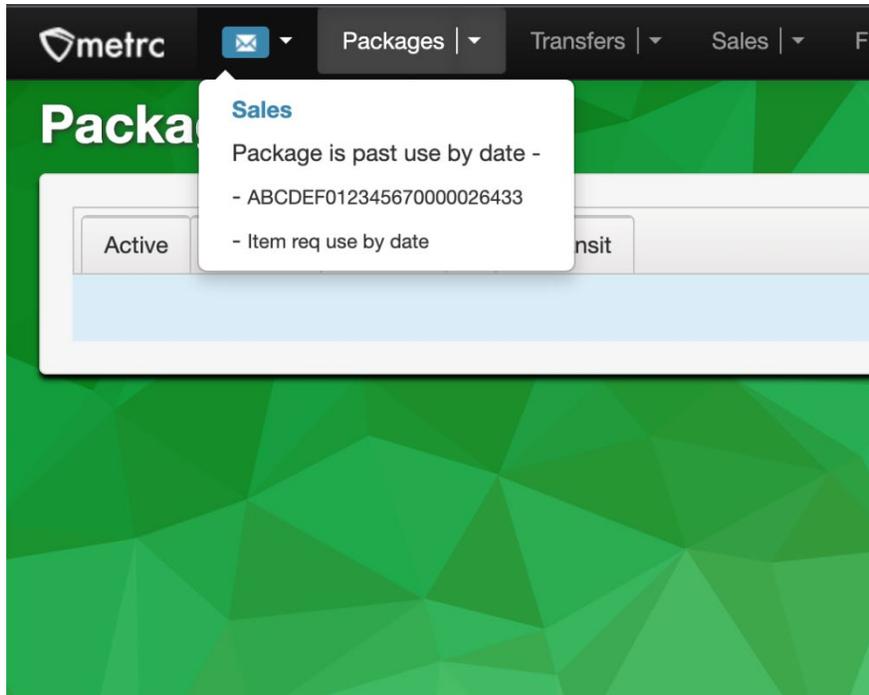

Figure 6: Sale made past Use by Date notification

Note: If using a Third Party Point of Sale system to perform sales, check with your Integrator to see what type of notification you may 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 7**.

- Package Sales
- Inventory Point in Time
- Packages Inventory

Figure 7: 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/packages/v2/* and *POST/packages/v1/create* – **see Figure 8.**

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 8: 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 9.**

Example Request

```
GET /items/v2/active?licenseNumber=123-ABC&lastModifiedStart=2018-01-17T06:
```

Example Response

```
{
  "Data": [
    {
      "Id": 1,
      "Name": "Buds",
      "ProductCategoryName": "Buds",
      "ProductCategoryType": "Buds",
      "IsExpirationDateRequired": false,
      "IsSellByDateRequired": false,
      "IsUseByDateRequired": false,
      "QuantityType": "WeightBased",
      "DefaultLabTestingState": "AwaitingConfirmation",
      "UnitOfMeasureName": "Ounces",
      "ApprovalStatus": "Approved",
      "ApprovalStatusDateTime": "0001-01-01T00:00:00+00:00",
      "StrainId": 1,
      "StrainName": "Spring Hill Kush",
      "ItemBrandId": 0,
      "ItemBrandName": null,
      "AdministrationMethod": null,
      "UnitCbdPercent": null,
      "UnitCbdContent": null,
      "UnitCbdContentUnitOfMeasureName": null,
      "UnitCbdContentDose": null,
      "UnitCbdContentDoseUnitOfMeasureName": null,
      "UnitThcPercent": null,
      "UnitThcContent": null,
      "UnitThcContentUnitOfMeasureName": null,
      "UnitThcContentDose": null,
      "UnitThcContentDoseUnitOfMeasureName": null,
      "UnitVolume": null,
```

Figure 9: 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 10** 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 10: Example of Retrieving a Package

In the event a package needs to have its Use by Date updated, a new endpoint *PUT /packages/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 11** below**.**

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 11: Example of Updating a Package Use by Date

Metrc Resources

If you have any questions, or need additional support:

Contact Metrc Support: Email Support@metrc.com or call 877-566-6506

Metrc Learn: Metrc Learn is designed to offer educational opportunities to enhance users' skills with the Metrc system and provides various training options based on experience level. In addition, the learning system is organized into facility-specific programs made up of various courses. To log in, visit Metrc Learn and enter your login credentials, or to access, register by visiting the Metrc Learn Registration.

Access additional resources: In the Metrc system, click on the "Support" dropdown in the top-right navigation pane and select the appropriate resource, including educational guides and more.

Thank you for your continued partnership.

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