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| <b>Bulletin Number:</b> 123  | <b>Distribution Date:</b> 3/4/2024              | <b>Effective Date:</b> See Bulletin Sections |
| <b>Contact Point:</b><br>api-info@metrc.com  | <b>Subject:</b> Metrc API Multi Program Updates |  |
| <b>Reason:</b> New API guidance on administratively held packages and accepted characters, updates for package creation in Oregon, and Patient Sales updates in Ohio |   |  |

Please read on for an important update regarding the Metrc API program and upcoming API changes related to updates for the following topics:

1. **All Programs**
  - Guidance on how to identify if a package is on administrative hold.
  - Guidance on acceptable characters for string fields.
  
2. **Oregon**
  - Guidance on upcoming requirements going into effect on March 4, 2024 regarding processing jobs.
  
3. **Ohio**
  - Patient Sales Reporting Updates going into effect on March 4, 2024.

Please read the following pages for more information:

## **All Programs: Administrative Hold Guidance**

Metrc has a function available that allows our regulatory partners to place packages on “Administrative Hold”. This function is often used alongside embargoes and recall efforts. When packages at a retail have this hold placed, sales to consumers should not be occurring and could result in public health impacts if the products in question are under Hold due to possible adverse effects reported – in addition to potentially resulting in serious violations and enforcement actions being issued to those retailers.

The Metrc API provides method(s), detailed below, for integrators to determine whether or not a package is currently under the system Administrative Hold status. This provides our integrator partners with the opportunity to improve compliance for their retail customers by flagging these products for increased visibility and potentially deterring or preventing these sales from occurring at the register.

1. Metrc provides a dedicated endpoint *GET /packages/v#/onhold* that can be checked daily to determine if any packages have been placed on Administrative Hold.
2. GET calls to Active Packages, Package ID, or Package Label all return a Boolean value for whether or not the package "IsOnHold".
3. When sending any sales (Receipt, Delivery, or Retailer Delivery) request, the Metrc API will return a warning message that the package is on Administrative Hold.

Additionally, Metrc provides identifiers in the user interface to also highlight if a licensee has any packages on administrative hold with multiple search options for licensees to review which packages have been placed on hold.

Each market may have different protocols for how they utilize the hold functionality, as well as different rules for retailers when products are under a hold. We encourage you to review pertinent information around retail sales violations in the markets you operate in and evaluate enhancements to your software to help drive visibility and improved compliance among your retail Point-of-Sale customers.

### **All Programs: Accepted Characters**

The Metrc API supports a number of string fields for user to input information such as Strain Names, Item Names, Locations, Harvest Batches, Plant Batches, Production Batches, Drivers, Vehicles, and Notes as some commonly used fields. The table below outlines accepted characters Metrc will receive for string fields.

| <b>Characters</b>  | <b>Accepted</b>         |
|--------------------|-------------------------|
| Lower Case Letters | a-z                     |
| Upper Case Letters | A-Z                     |
| Numbers            | 0-9                     |
| Special            | .?!@#\$\$%^&*()[]\ >+_- |

If a character is submitted that is not deemed acceptable, Metrc will begin returning an error message starting the week of March 11<sup>th</sup>. The error message will indicate "Invalid character or sequence in parameter {name}." The {name} will represent the name of the field where the invalid character or sequence was attempted to be used.

## **Oregon: Processing Jobs Update**

Previously, Metrc announced in API Bulletin 115 the initial adoption of a new Processing Jobs feature that was enabled within Oregon. This feature was intended to replace the use of the Production Batch fields for processing activities. Starting on March 4<sup>th</sup>, Production Batches will no longer be a usable field for the processing license type.

Additionally, the Combined Category will no longer be available for packages created from a harvest.

Metrc has released endpoints in support of the Processing Jobs functionality for licensees that conduct processing activities and have been available in Oregon since April of 2023.

To access these endpoints, integrators must have permissions to Packages and employees of the license must have access to “Manage Processing Job Types” and “Manage Processing Jobs Inventory”. The Metrc Administrator associated with the license will automatically have their permissions updated to utilize these new features.

The following is a list of the new endpoints and further details can be referenced [here](#):

- GET /processing/v#{id}
- GET /processing/v#/active
- GET /processing/v#/inactive
- POST /processing/v#/createpackages
- POST /processing/v#/start
- POST /processing/v#/adjust
- PUT /processing/v#/finish
- PUT /processing/v#/unfinish
- DELETE /processing/v#{id}
- GET /processing/v#/jobtypes/active
- GET /processing/v#/jobtypes/inactive
- POST /processing/v#/jobtypes
- PUT /processing/v#/jobtypes
- DELETE /processing/v#/jobtypes/{id}
- GET /processing/v#/jobtypes/attributes
- GET /processing/v#/jobtypes/categories

The following is an outline of how the endpoints can be used in conjunction with the process established for their usage by licensees.

1. Create Processing Job Types by using **POST /processing/v#/jobtypes** and reference these job types when starting a Processing Job.
  - To create a Processing Job Type, reference pre-configured Categories by the State Agency using **GET /processing/v#/jobtypes/categories** and pre-configured Attributes using **GET /processing/v#/jobtypes/attributes**. Only one Category can be used per Job Type, however, multiple Attributes can be used per Job Type.
  
2. Start a Processing Job by using **POST /processing/v#/start**
  - If a correction to the packages needs to be made after the creation of a Processing Job, please use **POST /processing/v1/adjust** to adjust the packages included within the Processing Job or add/remove packages to the Processing Job. As with Package Adjustments, a reason code and note should be input. Adjustments cannot be made after packages have been successfully created from the Processing Job.
  
3. When newly created products from the Processing Job are ready to be associated to packages, use **POST /processing/v#/createpackages**
  
4. After all newly packaged materials are created from the Processing Job, the job should be finished using **PUT /processing/v#/finish**
  - If a processing job was finished by mistake, it can be brought back to an active state by using **PUT /processing/v#/unfinish**
  
5. The packages that were created from Processing Job will return to the Active Packages grid and can continue through the next steps of the supply chain process that is currently in place.

## **Ohio: Patient Sales Update**

Metrc and the Ohio Medical Marijuana Control Program (MMCP) provide tools to ensure dispensaries remain compliant when allowing valid patients and caregivers to enter their facilities. It is the dispensary's responsibility to ensure that only validated patients and caregivers are allowed into the medical cannabis dispensary.

To start patient or caregiver validation, a visual check of the patient and/or caregiver ID is recommended. All patient and caregiver ID numbers must be in the following format:

- Twenty (20) numbers in the following format
- 0000-0000-0000-0000-0000
- No letters, symbols are included

***Please note that beginning on March 4, 2024, Metrc will start returning an error that the patient is invalid if the outlined format is not submitted via the API or UI for the Ohio Metrc system.***

Example of a patient or caregiver ID that meets the requirements above: **1234-5678-9012-3456-7890**

Two common mistakes when entering the patient ID number include:

- Transposing letters or inputting a "0" (number) instead of "O" (letter)
- Entering the patient's registration number instead of their patient ID number

If you have questions regarding the information included in this bulletin, please contact Metrc Support at [api-info@metrc.com](mailto:api-info@metrc.com).