



Medical Marijuana Advisory Board Meeting

Tuesday, November 16, 2021

10:00am to noon

MMAB Agenda

- I. Call to order and roll call
- II. Approval of the minutes – meeting Aug. 17, 2021
- III. Program Update
- IV. Old Business
 - a. Subcommittee Assignments
- V. New Business
 - a. Review the Qualifying Medical Conditions for Medical Marijuana Usage Applications
 - i. Chronic Hepatitis
 - b. Chapter 20 Medical Marijuana Research
 - c. Processes and Procedures:
 - i. Reports – proposed policy for reviewing recommendations and creating reports
 - ii. Recommendation Submittal
 - iii. Serious Medical Conditions (SMCs)
 1. Approving SMCs for Chapter 20 Research
 2. Submittals presented through recommendations
 3. Proposed revisions to current public submittal process
- VI. Subcommittee Updates
- VII. Additional Discussion/Q&A
- VIII. Adjournment

Medical Marijuana Program Update

- Act 44 Implementation
- Medical Marijuana Assistance Program
- Patient Purchasing Activity
- Program Growth Metrics
- Permittee Pricing Trends

Medical Marijuana Program Update

- Program to date:
 - 681,504 Patients and Caregivers Registered;
 - 384,254 Active Patient Certifications;
 - 1,678 Approved Practitioners;
 - 16.5 Million Patient Dispensing Events;
 - 47.0 Million Products Dispensed;
 - \$4.0 Billion in Total Sales;
 - \$1.6 Billion by G/Ps to Dispensaries; and
 - \$2.4 Billion by Dispensaries.

Act 44 Implementation

Medical Marijuana Program Update

Act 44 Implementation Status

Category / Area Impacted	In Design	Implementation In Progress	Implemented	TOTAL
Major Project or New Program		2		2
Grower/Processors and Labs		4	3	7
Background Checks		1	4	5
Permitting		1	1	2
Dispensaries			5	5
Governance/ Regulations			5	5
Practitioners/ Caregivers			3	3
Research			4	4
TOTAL	0	8	25	33

**Progress Since
Last MMAB:**

4 → 0	6 → 8	23 → 25
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Medical Marijuana Assistance Program (MMAAP)

Medical Marijuana Program Update

Current and Planned Medical Marijuana Assistance

	Full Cost	Current Cost After Benefits	MMAP Phase 1 (Q1 2022)	MMAP Phase 2 (timing TBD)	MMAP Phase 3 (timing TBD)
MM Identification Card	\$50.00	\$25.00 <i>50% discount</i>	No Cost <i>No ID card costs for eligible patients and caregivers</i>		

[35 P.S. Section 10231.902](#)

Medical Marijuana Program Update

Current and Planned Medical Marijuana Assistance

	Full Cost	Current Cost After Benefits	MMAP Phase 1 (Q1 2022)	MMAP Phase 2 (timing TBD)	MMAP Phase 3 (timing TBD)
MM Identification Card	\$50.00	\$25.00 <i>50% discount</i>	No Cost <i>No ID card costs for eligible patients and caregivers</i>		
Caregiver Background Checks	\$20.85	\$7.60 <i>65% discount</i>		No Cost <i>No cost for eligible caregiver background checks</i>	

[35 P.S. Section 10231.902](#)

Medical Marijuana Program Update

Current and Planned Medical Marijuana Assistance

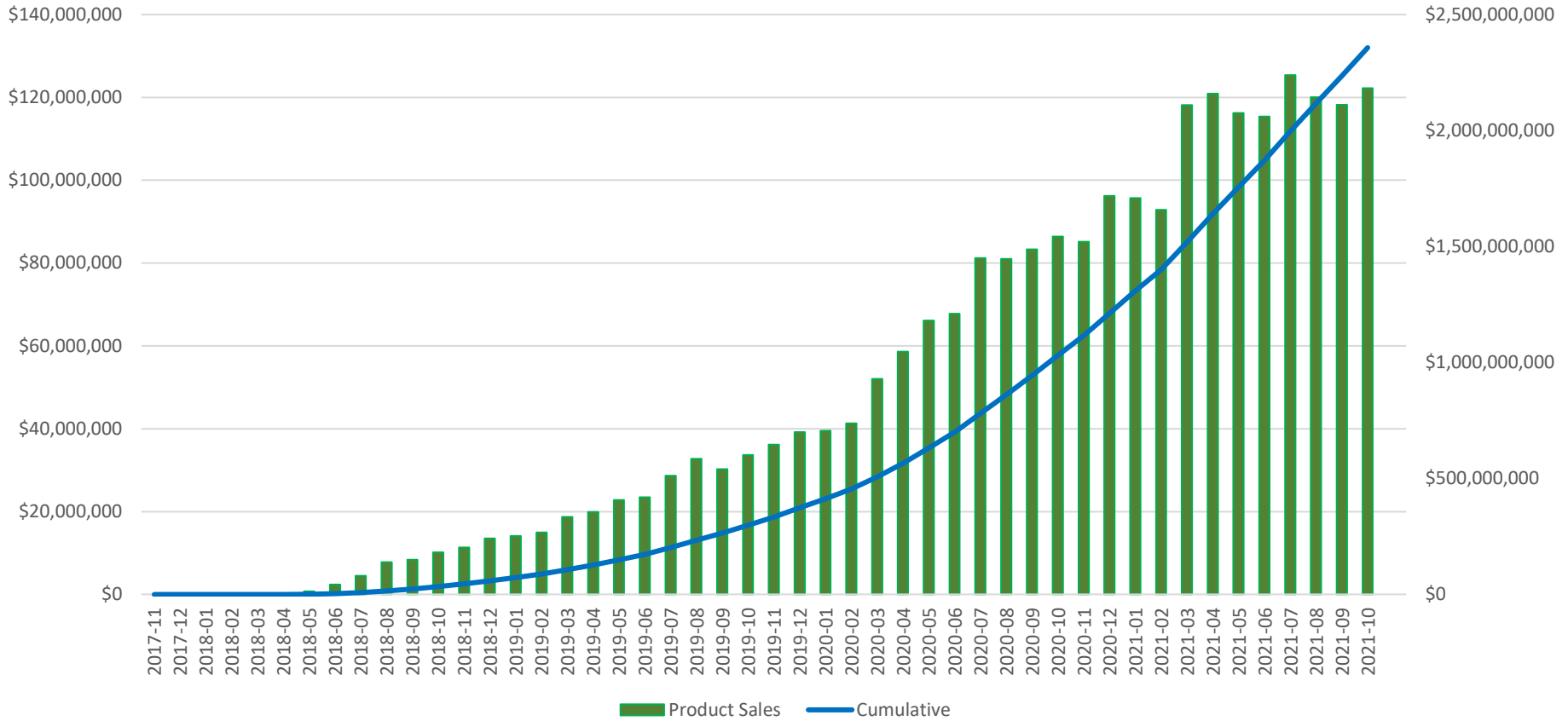
	Full Cost	Current Cost After Benefits	MMAP Phase 1 (Q1 2022)	MMAP Phase 2 (timing TBD)	MMAP Phase 3 (timing TBD)
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Caregiver Background Checks	\$20.85	\$7.60 <i>65% discount</i>		No Cost <i>No cost for eligible caregiver background checks</i>	
Patient Product Cost	Dispensary Retail Price				Assistance <i>Monthly value for eligible patients</i>

[35 P.S. Section 10231.902](#)

Patient Purchasing Activity

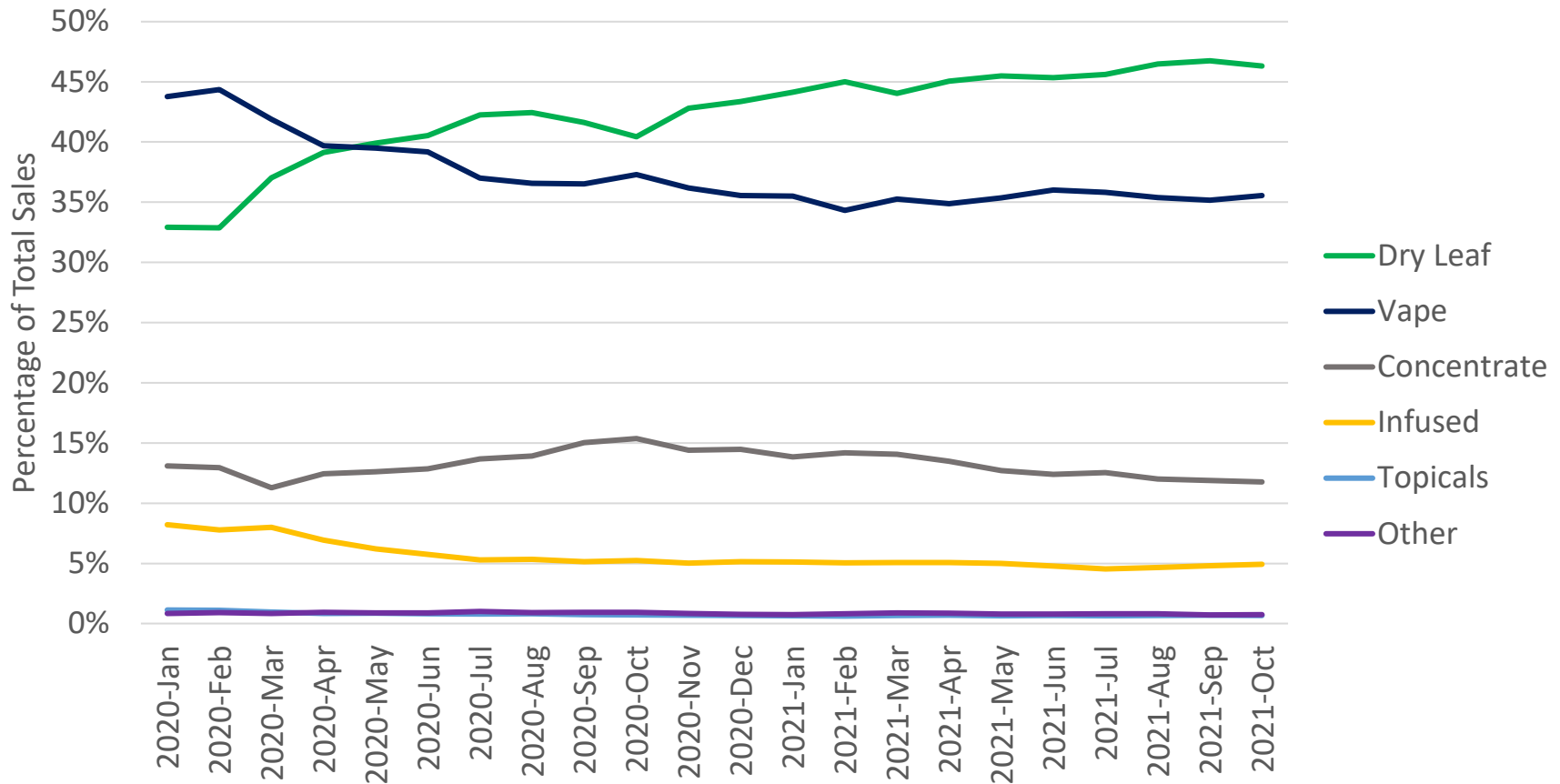
Medical Marijuana Program Update

Total Dispensary Sales



Medical Marijuana Program Update

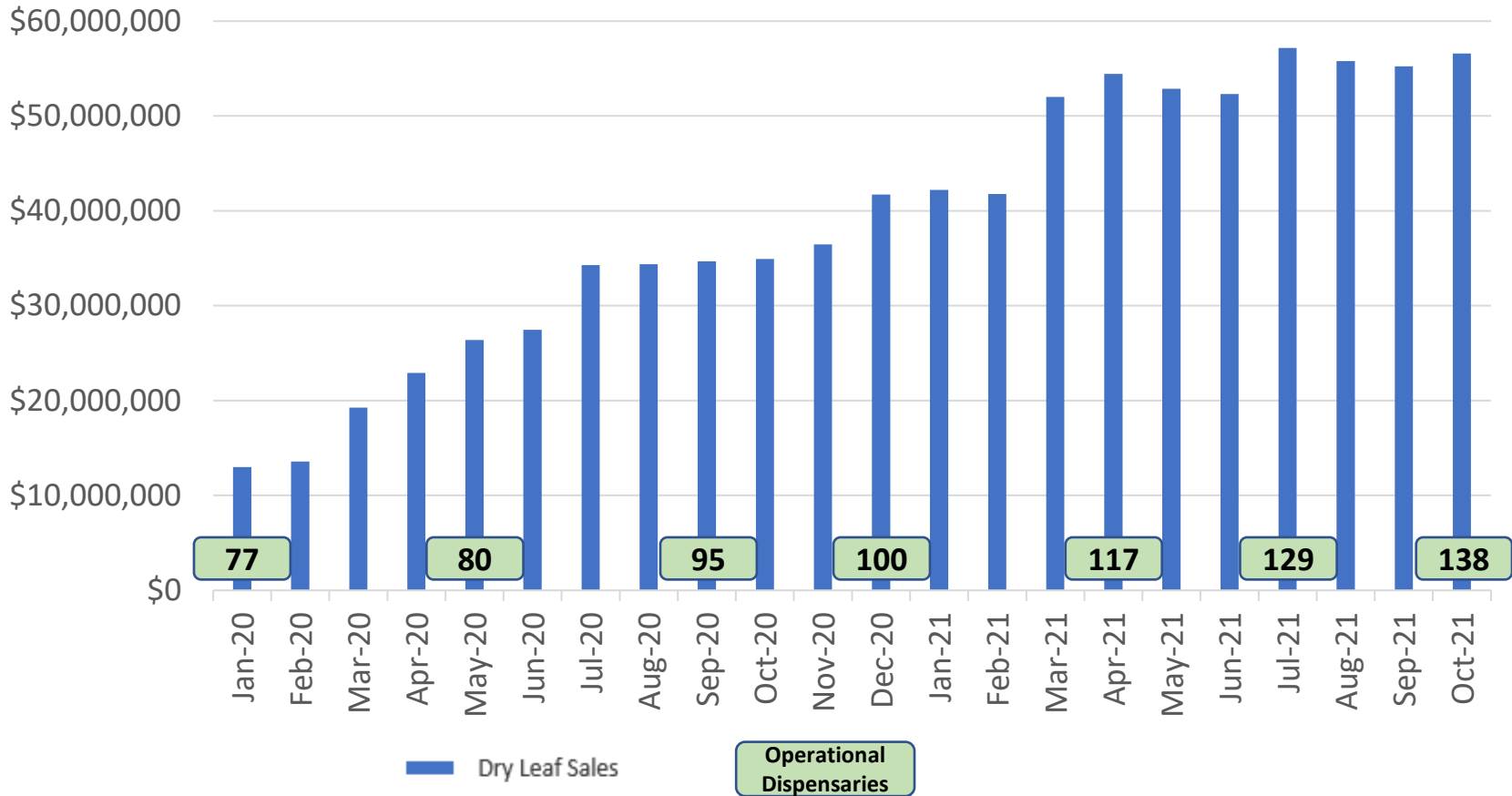
Patient Purchasing Trends by Product Category



Permittee Pricing Trends

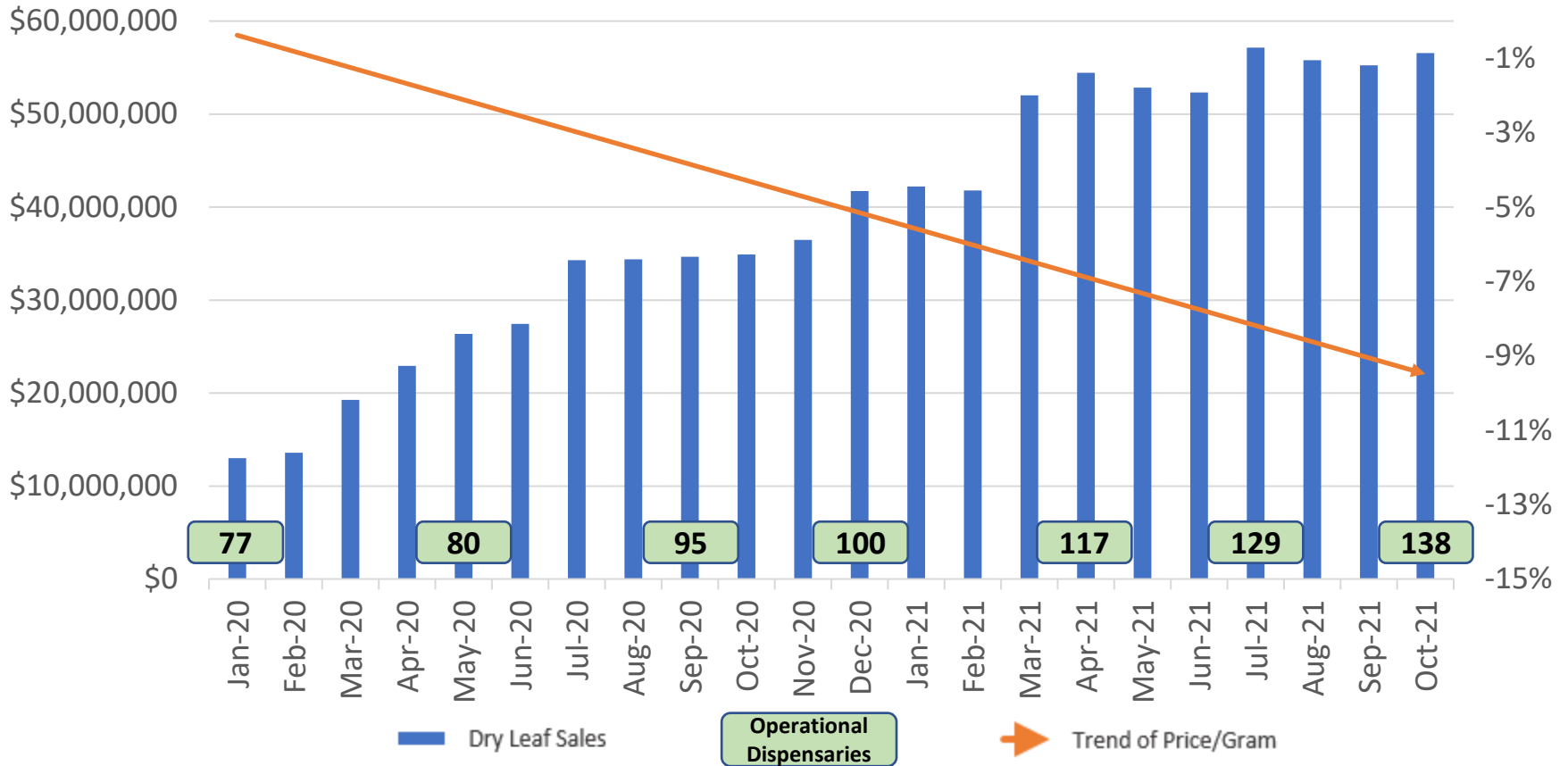
Medical Marijuana Program Update

Sales Volume Increases as Demand and Operational Dispensaries Grow
Dry Leaf Sales



Medical Marijuana Program Update

Sales Volume Increases as Demand and Operational Dispensaries Grow
Dry Leaf Sales and Pricing Trends



Medical Marijuana Program Update

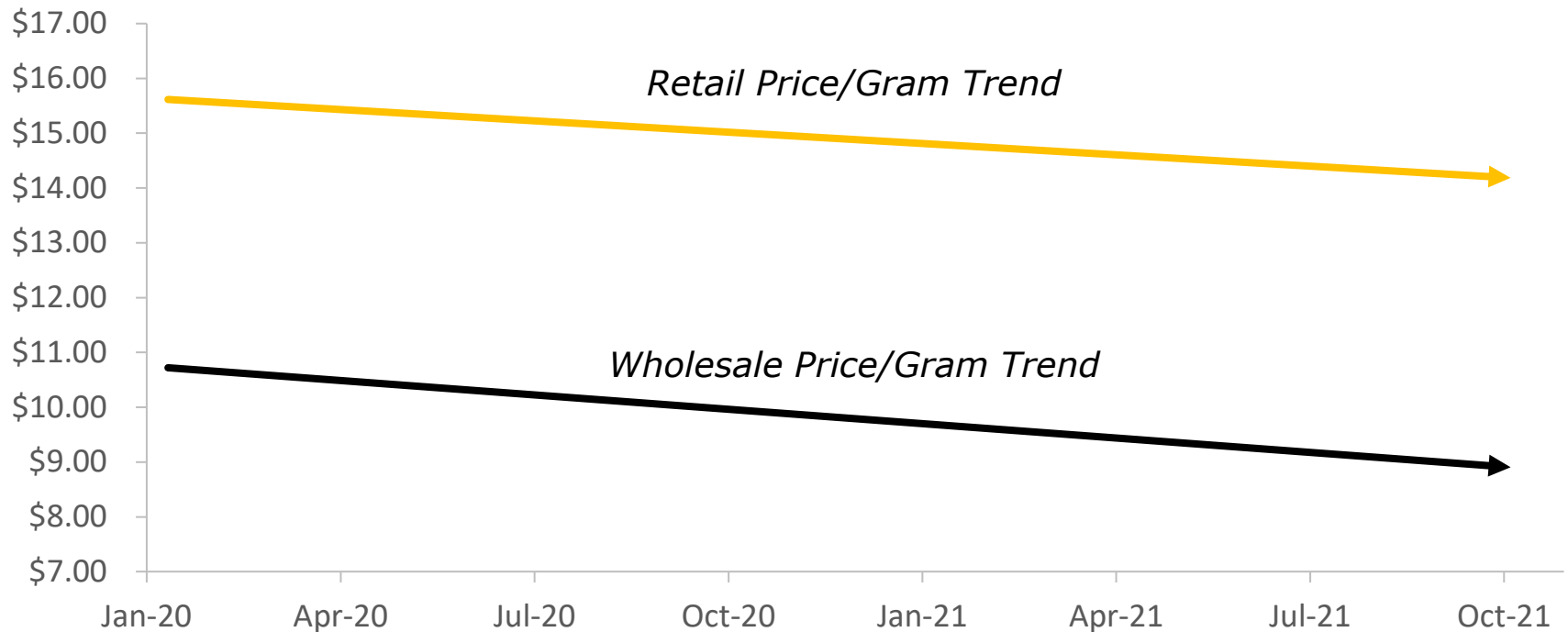
Wholesale Price Decline Trend More In Line With Retail Price Declines
Dry Leaf Retail and Wholesale Pricing Trends



Medical Marijuana Program Update

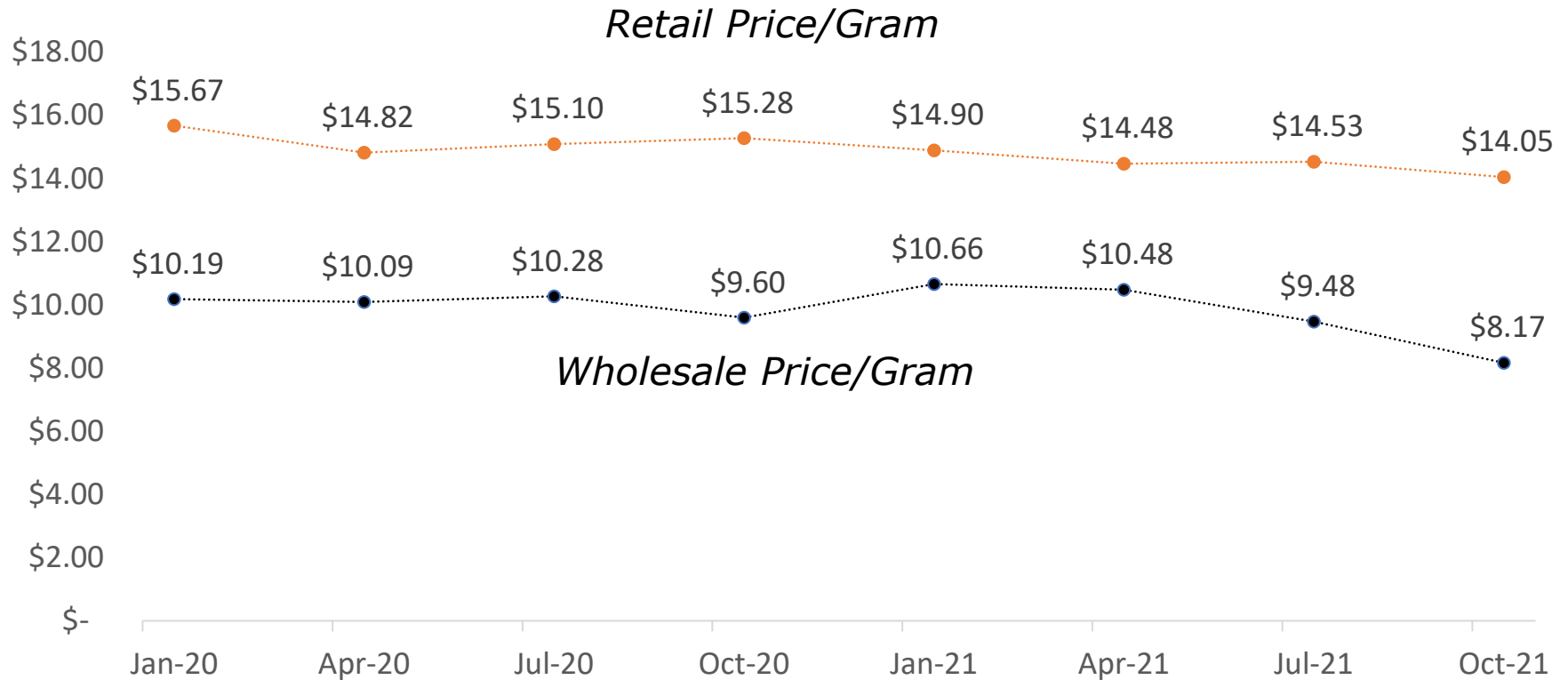
Dry Leaf Retail Pricing Tracking to Grower/Processor Wholesale Pricing

Dry Leaf Retail and Wholesale Pricing Trends



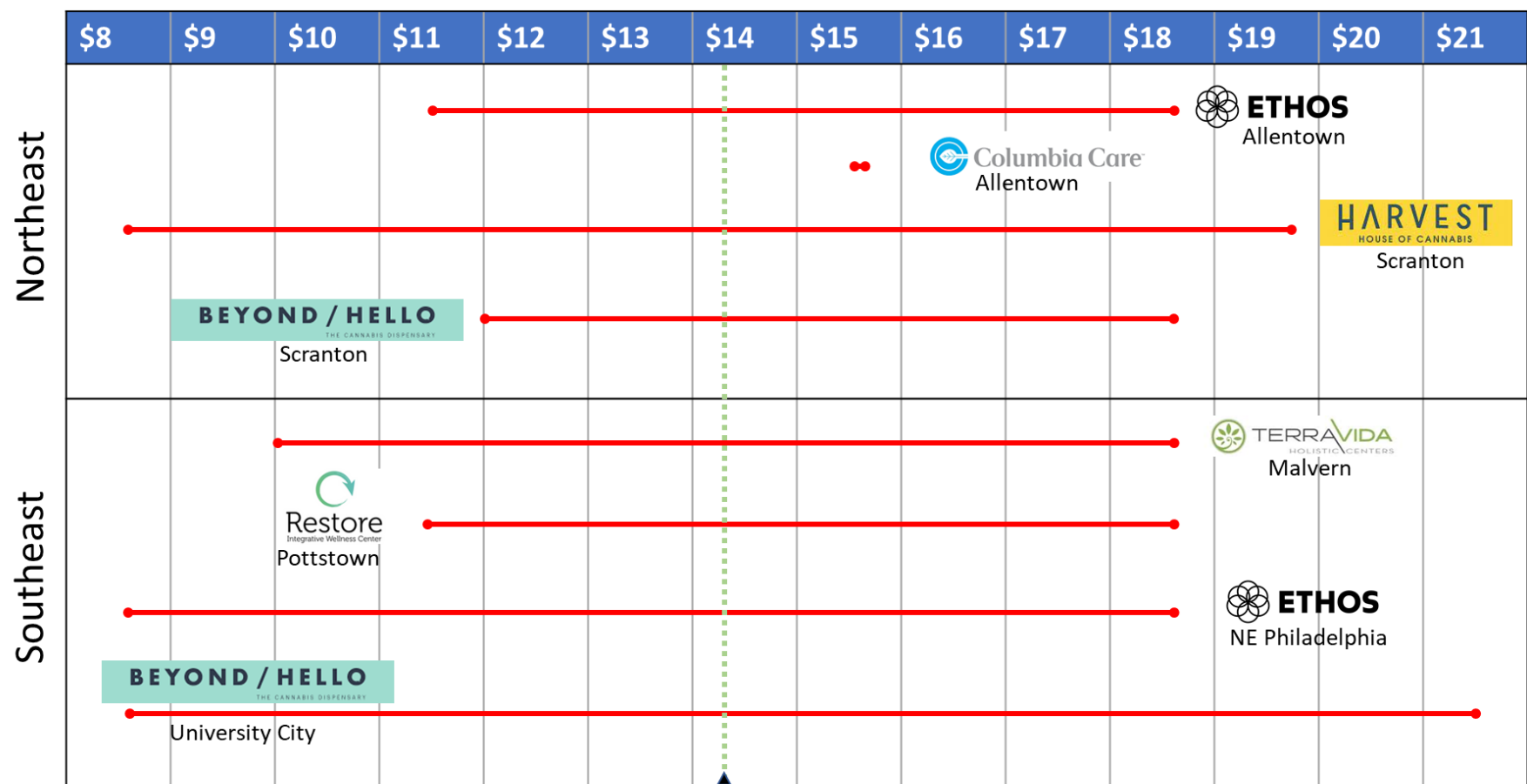
Medical Marijuana Program Update

Dry Leaf Retail and Wholesale Pricing Details



Medical Marijuana Program Update

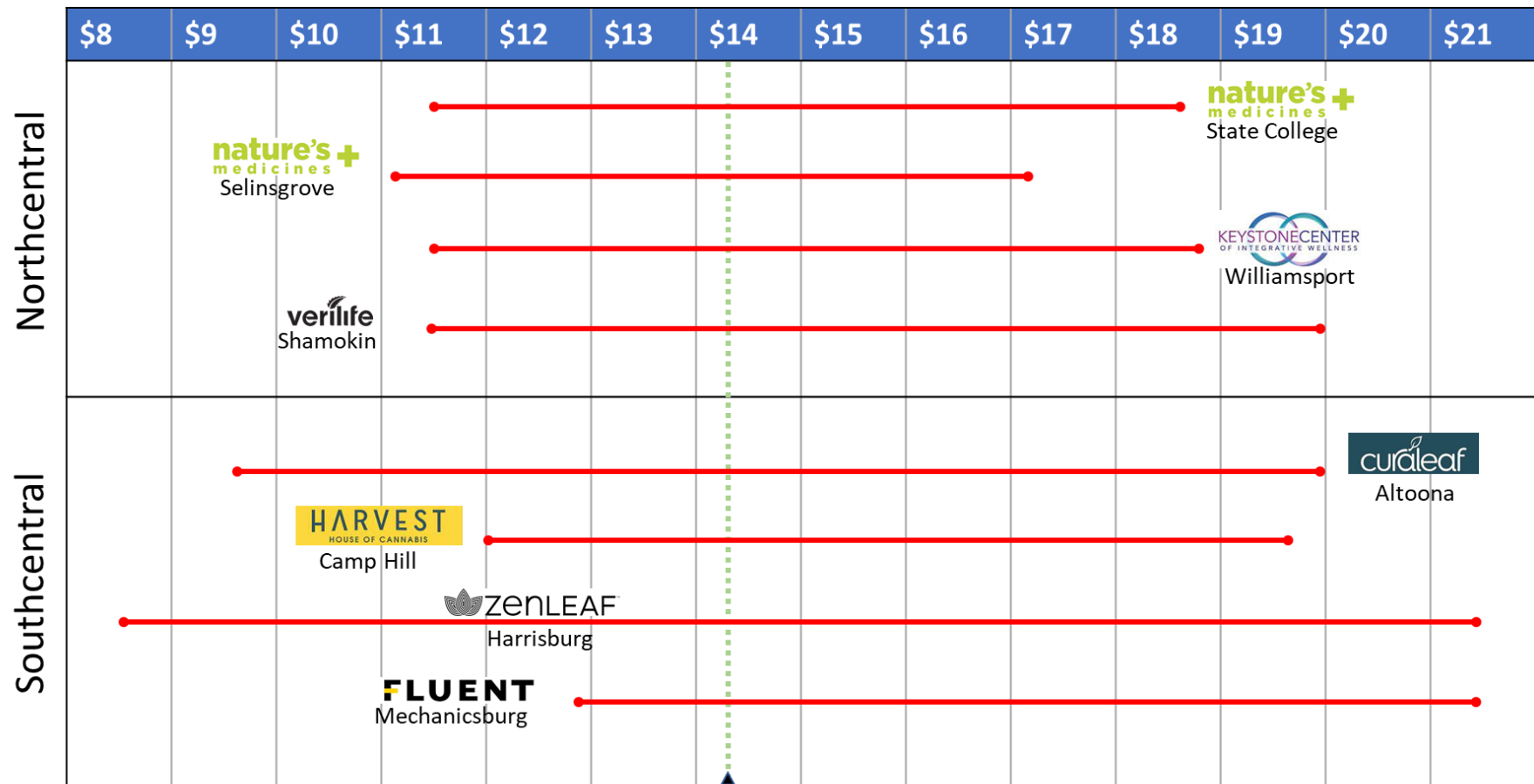
Per Gram Retail Price Sampling Summary (Eastern Regions)



Aug 2021 Dry Leaf per gram Avg. (\$14.27)

Medical Marijuana Program Update

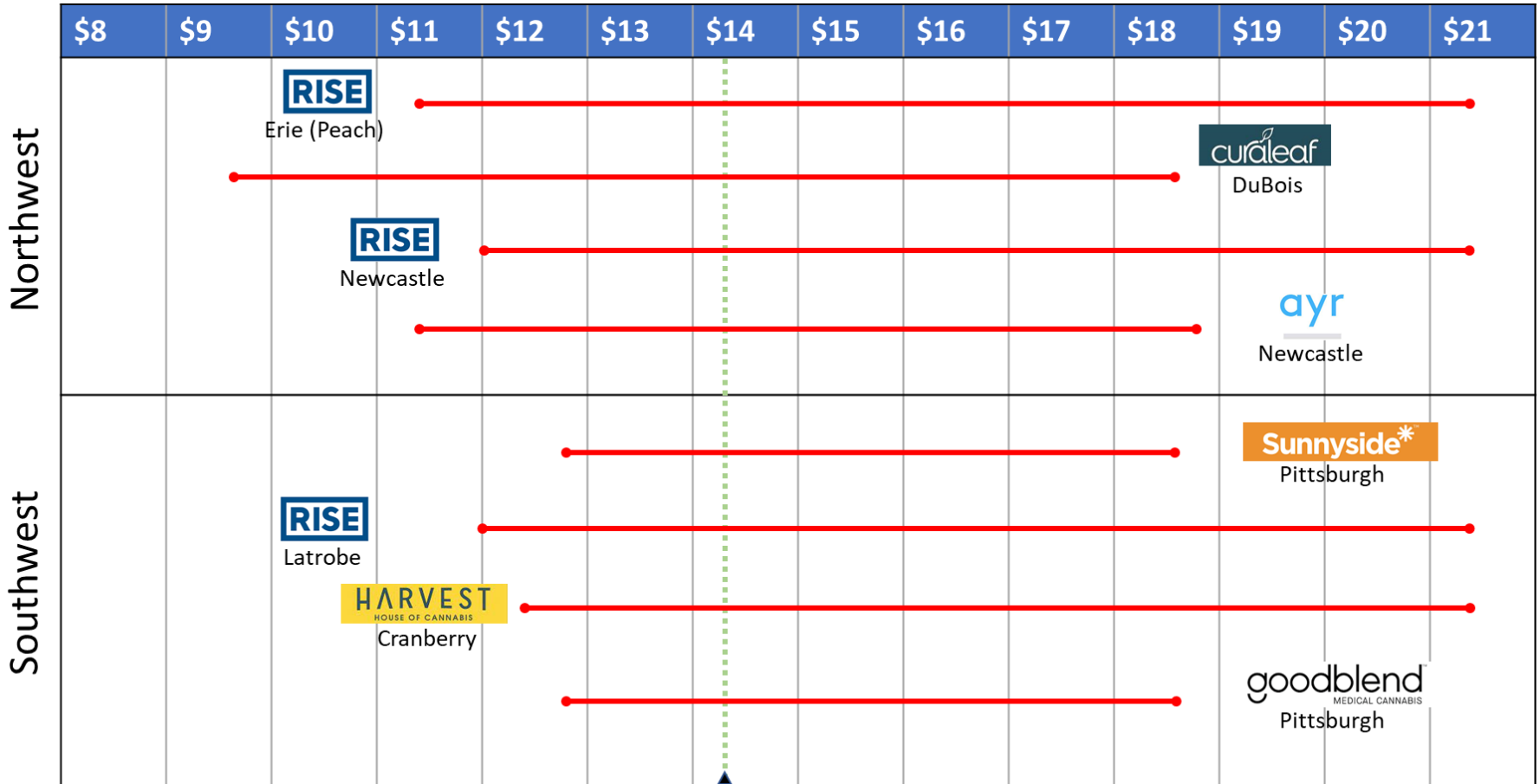
Per Gram Retail Price Sampling Summary (Central Regions)



Aug 2021 Dry Leaf per gram Avg. (\$14.27)

Medical Marijuana Program Update

Per Gram Retail Price Sampling Summary (Western Regions)



Aug 2021 Dry Leaf per gram Avg. (\$14.27)

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Subcommittee Assignments

- The Regulatory Subcommittee
Janet Getzy Hart
- Medical Review Subcommittee
Dr. Denise Johnson
- Medical Research Subcommittee
Bhavini Patel
- Patient and Caregiver Subcommittee
Molly Robertson
- Reports Subcommittee
Luke Schultz

▶ Review SMC Applications

Review the Qualifying Medical Conditions for Medical Marijuana Usage Applications

- ▣ Chronic Hepatitis

Ch. 20 Medical Marijuana Research

	<u>Current: Research Program</u>	Research Project or Study
1) When research can begin	Any time under DOH's proposed Chapter 20 temporary regulations <u>28 Pa. Code § 1211.29</u>	Upon amendment of the Controlled Substances Act, 21 U.S.C. § 812 (rescheduling marijuana), and notice in the Pennsylvania Bulletin by DOH in accordance with Section 2003 of Act 43 of 2018 and Section 2108 of Act 16 of 2016 <u>Act 43, Section 2003</u>
2) Conditions studied	Only the serious medical conditions recognized by Act 16 of 2016 or DOH's current temporary regulations <u>28 Pa. Code § 1211.21</u>	Any medical or psychological condition <u>28 Pa. Code § 1211.21</u>
3) Manner in which medical marijuana is dispensed	Only in the forms recognized by Act 16 of 2016 or DOH's current temporary regulations <u>28 Pa. Code § 1211.29(a)</u>	Any form deemed medically safe by an institutional review board <u>28 Pa. Code § 1211.29(b)</u>
4) Who supervises the research	Research Approval Committee or Institutional Review Board as defined by DOH's proposed Chapter 20 temporary regulations <u>28 Pa. Code § 1211.29(c)</u>	Institutional Review Board as defined by DOH's proposed Chapter 20 temporary regulations <u>28 Pa. Code § 1211.29(d)</u>
5) How medical marijuana is dispensed	By a clinical registrant dispensary only to patients or caregivers in accordance with Act 43 of 2018 and DOH's proposed Chapter 20 temporary regulations <u>28 Pa. Code § 1211.29(a)</u>	By a clinical registrant dispensary to patients or caregivers or to an ACRC in accordance with Act 43 of 2018 <u>28 Pa. Code § 1211.29(b)</u>

Processes and Procedures

- Reports – proposed policy for reviewing recommendations and creating reports
- Recommendation Submittal
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 - ▣ Approving SMCs for Chapter 20 Research
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▶ Proposed Reports Process

(1) After each meeting where a recommendation is approved by the advisory board to change the medical marijuana program, the reports subcommittee will produce a written report.

Recommendations to change the medical marijuana program include:

(i) Whether to change the types of medical professionals who can issue certifications to patients.

(ii) Whether to change, add or reduce the types of medical conditions which qualify as serious medical conditions under this act.

(iii) Whether to change the form of medical marijuana permitted under this act.

(iv) How to ensure affordable patient access to medical marijuana.

▶ Proposed Reports Process Cont.

(2) Reports shall include approved recommendations and related findings. The reports may also include findings on recommendations not approved or other issues, other advisory board activities, and general information and updates on the medical marijuana program.

(3) Reports will be presented by the reports subcommittee to the advisory board for adoption at the next regularly scheduled public meeting.

(4) Adopted reports shall be provided to the Secretary of Health, the Governor, the Senate, the House of Representatives, and will be public record under the Right-to-Know Law.

Processes and Procedures

- Recommendation Submittal
- Serious Medical Conditions (SMCs)
 - ▣ Approving SMCs for Chapter 20 Research
 - ▣ Submittals presented through recommendations
 - ▣ Proposed revisions to current public submittal process

Subcommittee Updates

- Medical Research Review Subcommittee
Bhavini Patel
- Patient and Caregiver Subcommittee
Molly Robertson
- Regulatory Subcommittee
Janet Getzy Hart
- Reports Subcommittee
Luke Schultz
- Medical Review Subcommittee
Dr. Denise Johnson

MMAB Meeting

- Additional Discussion
- Next Board Meeting
 - January 27, 2022 (10:00am to noon)
- Adjournment