# REDCap Upgrade Summary: 14.0.31 → 15.5

## *(Summary of key changes and new features in REDCap version 15.5)*

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# Overview

This upgrade introduces several enhancements aimed at improving usability, compliance, and project customization. Key updates include improvements to e-Consent, randomization options, custom styling, and additional user control features.

## Key Feature Updates

* e-Consent & PDF Snapshots
* Randomization Enhancements
* Custom CSS styling for Forms and Surveys
* Record Limit for Development Projects
* Pause Recurring Alerts
* Descriptive Popups for Forms and Surveys
* Draft Preview Mode

## e-Consent & PDF Snapshots

* A new “Settings for e-Consent & PDF Snapshots" page (linked from the Online Designer) lets users enable the e-Consent Framework and set up PDF Snapshot triggers for a survey.

*Note: These options were previously located in the Survey Settings page and have now been moved to this new dedicated page.*

#### Key Enhancements:

* Separate tabs for configuring e-Consent Framework and PDF Snapshot settings
* Secure and organized storage of consent forms and survey responses.
* Robust version control and audit trails to meet ICH and FDA regulatory standards

View a 5-minute overview video of the new features: <https://redcap.link/econsent2vid>

## REDCap Randomization Updates

REDCap now supports more flexible and powerful randomization features, including:

#### 1. Multiple Randomization Models

* Projects can now include multiple randomization models, each with its own independent setup. This is ideal for studies with multiple groups, phases, or stratification criteria.

#### 2. Blinded Randomization

* Supports double-blind studies by hiding treatment group allocations form users

#### 3. Smart Variables

New variables for notification, piping and conditional logic:

* **[rand-number]** – Assigned Randomization Value
* **[rand-time]** – Timestamp of Randomization
* **[rand-utc-time]** – Timestamp in UTC

#### 4*. Real-Time Triggers*

* Randomization can occur automatically when a form is saved, eliminating the need to click the “Randomize” button manually.
* Set logic to control when randomization should happen (e.g., based on form values) for both users and survey participants.

#### 5. API Support for Randomization

  You can now perform randomization through the REDCap API.

* Provide a **record name** and a **model ID** in your API call, and you’ll receive the randomization result automatically.
* If you have API access, you can try this out and set it up in the **API Playground**.

## Custom CSS Styling for Forms and Surveys

You can now apply custom visual styles (using CSS) to individual forms and surveys in your project.

For Surveys:

* + Set styles on the Survey Settings page
	+ Option to click “Copy design to other surveys” to reuse styles across surveys
	+ Survey styling updates are immediate and do not require draft mode

For Forms:

* + Apply styles at the field level using the Online Designer
	+ Draft Mode is required for changes in production

This feature is ideal for teams that want to match surveys to study branding and improve user experience.

## Record Limit for Development Projects

If your REDCap project is in **development status**, there may be a limit on the number of records you can create.

* Once your project reaches this limit, you’ll see a **warning message** when trying to add new records.

**Example Warning Message:**
 *Operation could not be completed because the maximum record limit has already been reached for this project in development status.*

* After that, you will **no longer be able to create additional records** in that project. This applies whether you’re:
	+ entering data manually,
	+ importing data,
	+ using the API, or
	+ uploading files that include records.
* **Important:** This only affects projects in **development**. Projects in **production** or **inactive status** are not impacted.

**Public Surveys:** If a public survey is active in a development project and the record limit is reached, data collection will stop without a notice to participants. Plan carefully before enabling this setting mid-study.

## Pause Recurring Alerts setting

Alerts triggered by conditional logic that have the "Ensure logic is still true..." now support a new setting:

* "Allow pausing of recurrences? (Existing interval will continue if the logic becomes true again after becoming false.)".
* This setting is optional and can be enabled based on your project needs .
* When enabled REDCap will pause (rather than delete) any scheduled recurrences when the alert's logic becomes false.
* This feature is useful when you expect the alert logic to become true again in the future. For example, with time-based conditions like datediff().

## Descriptive Popups on Forms and Surveys

You can now adddescriptive popups to your REDCap forms and surveys — a helpful way to provide extra information without cluttering the page.

#### How you can use descriptive pop-ups:

* Highlight important terms or phrases that may need further explanation
* Offer clarifications or instructions without showing them all the time

#### Customization Options

* Choose where the popups appear: By default, they show on all instruments (forms and surveys), but you can select specific ones.
* For surveys, especially multi-page ones, you can control which pages the popups appear on.

#### Accessibility Support

* Descriptive popups are WCAG-compliant, meaning they are accessible for screen readers and meet web accessibility standards.

#### Multi-Language Support

* If you're using REDCap's Multi-Language Management (MLM), both the link text and the popup content can be translated into multiple languages.

#### Copying or Exporting Projects

* When copying a project or exporting it as a Project XML file, you now have the option to include descriptive popup settings — making it easier to reuse or share your work.

##

## Draft Preview Mode

Draft Preview Mode allows you to test your changes to a form before submitting them for approval.

This is helpful when you're working in Draft Mode (in a project that's in production) and want to:

* Check branching logic
* Test calculated fields
* Review action tags and embedded fields
* See exactly how your form will behave once changes go live

When Draft Preview Mode is enabled:

* All current draft changes are applied to the form
* You can interact with the form just like you would during real data entry
* Test data can be entered but it is not saved, and it disappears after you exit the preview

This is a temporary testing space to validate your changes without impacting real data.

Limitations include:

* You cannot create new records
* Test data is not stored
* Only existing forms can be previewed (not newly added ones)
* You cannot delete records or form data
* Surveys are not supported in Draft Preview

More limitations are shown in REDCap when you turn on Draft Preview Mode.

Draft Preview Mode can be used on:

* Data Entry Forms
* Record Status Dashboard
* Record Home Page

Use Draft Preview Mode when you want to:

* Validate form logic or calculations
* Confirm the layout and behavior before submitting for approval