

REDCap Upgrade Summary: 14.0 → 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

1. 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>

2. 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 from 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**.

3. 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.

4. 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.

5. 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()`.

6. Descriptive Popups on Forms and Surveys

You can now add descriptive 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.

7. 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