

New Features in REDCap Version 14 and 15

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MEDICINE

Learning Objectives

- High-level review of the major improvements
 - Where to find a description of all changes
- Review new features in eConsent Framework
 - Where to find more information/training resources
- Understand new functionality in online designer
- Show improvements to data dictionary and codebook
- Demonstrate test run option in alerts & notifications
- Learn about improvements to randomization
 - Where to find more information/resources
- Explain new feature- Bulk Record Delete
- Review new option in User Rights
- Review improvements to MyCap

Complete List & Description of New Features

Version 14.5:

<https://redcap.research.yale.edu/surveys/?s=DNFC7X9XD79H4YET>

Version 15.0:

<https://redcap.research.yale.edu/surveys/?s=738LXWLRXAHNY7EE>

Enhanced eConsent Framework

eConsent New Features

- Streamlined consent process
- Improved audit trail
- Customizable consent forms with version control
- Support for multi-form consents
- New built-in PDF viewer


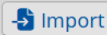

Refer to the recently updated FAQs on how to build and administer eConsent.

<https://portal.redcap.yale.edu/resources/frequently-asked-questions>

Online Designer

Online Designer – New Buttons


Data Collection Instruments


-  **Create** a new instrument from scratch
-  **Import** a new instrument from the official [REDCap Instrument Library](#)
-  **Upload** instrument ZIP file from another project/user or [external libraries](#)

Form options:

 **PDF Snapshots**

 **Form Display Logic** ▼

 **PDF (all instruments)**


 **Descriptive Popups**

Survey options:

 **e-Consent** ✓

 **Survey Login**

 **Survey Queue** ▼

 **Auto Invitation options** ▼

 **Survey Notifications**

Online Designer – Display

- Field validation type and action tags are displayed below each field

The screenshot displays the REDCap Online Designer interface with two field configurations visible. Each configuration includes a header bar with icons (edit, copy, paste, add, delete) and the field name. Below the header is the field label, a text input box, and the validation type. The 'Date of Screening' field has a calendar icon, a 'Today' button, and a date format dropdown set to 'M-D-Y'. The 'Screen status' field has a 'View equation' link. Between the two field configurations are three buttons: 'Add Field', 'Add Matrix of Fields', and 'Import from Field Bank'.

Field 1: Date of Screening

Field Name: `scrn_date`

Date of Screening

* must provide value

Validation type: Date (M-D-Y)

Buttons: Add Field, Add Matrix of Fields, Import from Field Bank

Field 2: Screen status

Field Name: `scrn_status`

Screen status

Validation type: None


@CALCTEXT @HIDDEN

View equation

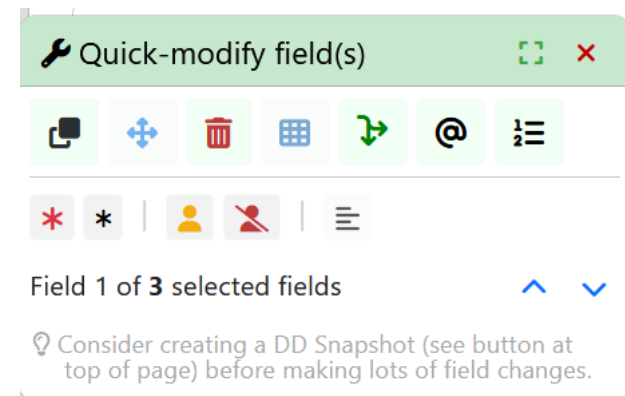
Online Designer – Quick Modify Fields

- Quick modify multiple fields
 - Ctrl_click to select multiple fields or check the new checkboxes on the far right of each field
 - Ability to edit the following for multiple fields:
 - branching logic, action tags/field annotation, custom alignment, required status, identifier status, and multiple choice options
 - Option to convert multiple fields to matrix group

💡 How to modify multiple fields together

To copy, move, or delete multiple fields at the same time, hold the Ctrl or Cmd key on your keyboard and click the field to reveal the  **Quick-modify field(s)** feature.

Show: ☐ Overlaid ☒ On Side



Online Designer – Go To Field

- New 'Go to field' feature

Field Navigator

You can quickly move to (and select a field) by using the '[Go to field](#)' widget (keyboard shortcut: **CTRL-G** or **CMD-G**).

Scroll to Section Header:

PATIENT CONTACT INFORMATION
PROM...

Primary Address at Enrollment (R...
Correspondence Address (Mailing)
Phone & Email

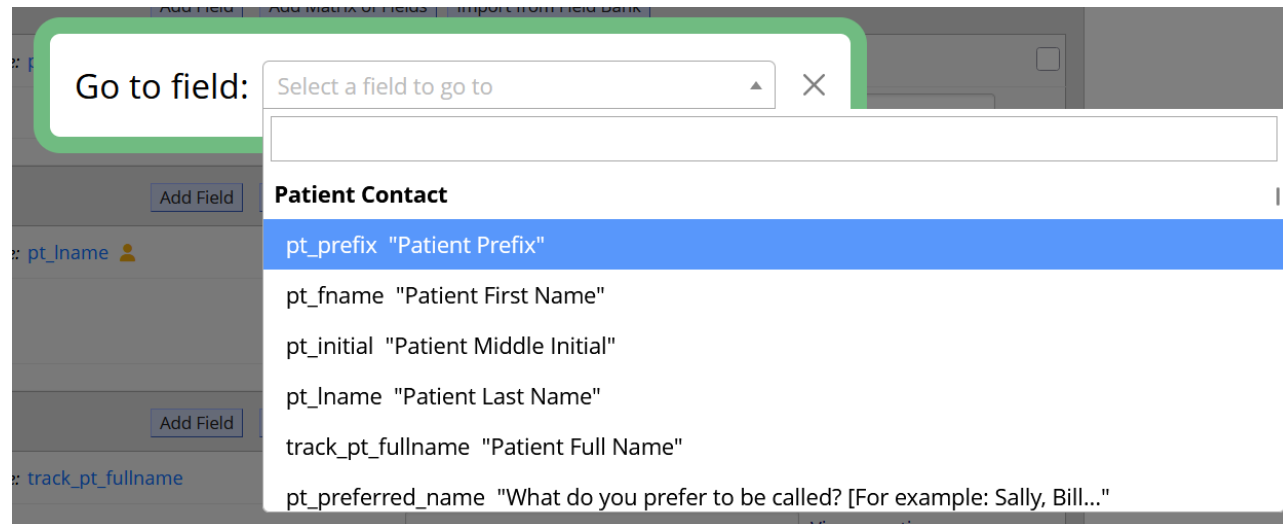
HEALTH INFORMATION

Insurance Payer

Cardiologist

Primary Care Provider (Primary P...

OTHER CONTACTS FOR STUDY PROMPT:...



Draft Preview Mode

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Submit Ch

☐ Draft P

Draft Preview Mode

Draft Preview Mode allows you to **preview your data entry forms with your current drafted changes as if they were live**. This allows you to fully test the changes you have made in Draft Mode, including all branching logic, calculations, action tags, and embedded fields, before submitting your drafted changes for approval.

Additionally, Draft Preview Mode will **simulate live data entry on data entry forms**, thus allowing you to enter *ephemeral data* that is stored only in your session; however, **no data will actually be saved to the project**. Once you leave Draft Preview Mode, all ephemeral data that has been entered will vanish.

LIMITATIONS: While in Draft Preview Mode, the following limitations exist...

- No new records can be created
- No data can be changed or stored in the project (all data changes are transient and are bound to your login session)
- Only changes to already existing forms can be previewed
- Delete operations (deleting whole records or deleting data for forms/events) are disabled
- Record locking and form-level locking/unlocking are disabled
- Randomization of a record and access to the Randomization module are disabled
- Field Comments/Data Resolution Workflow and the Data History Popup are disabled
- No Alerts, ASIs, or Data Entry Triggers will be triggered
- Form Display Logic is disabled
- Note: Draft Preview Mode only operates on data entry pages, the Record Status Dashboard, and the Record Home Page. It does not impact any other pages, and it currently **does not work on survey pages**.

Note that Draft Preview Mode is active only for you. It will remain active until turned off or until your current REDCap session ends.

Descriptive Popups

Data Collection Instruments

[+ Create](#) a new instrument from scratch

[Import](#) a new instrument from an existing instrument

[Upload](#) instrument ZIP file from your computer

[Return to Descriptive Popup List](#)

Create New Descriptive Popup

Link Text - Text that will be displayed as a hyperlink (should match an existing word or phrase on the form/survey)

Popup Text - Rich text to be displayed as the popup's content

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Main Display Options:

Link Color - Click on the picker to select a color:

☒ Display on Data Entry Forms ☐ Display on Surveys ☐ Display on First Match Only

Additional Options:

Activate on specific instruments/surveys - You may select specific instruments on which to enable this descriptive popup. If no instruments are selected, then this popup will be active for all instruments in the project.

Patient Screening Form

Caregiver Screening Form

Patient Contact

Caregiver Contact

Activate on specific page numbers (for surveys only) - You may use the field below to define on which survey pages this popup should be active. If no survey page numbers are specified, this popup will apply to all pages for the selected survey instrument(s). Pages for each instrument must be defined on a new line and page numbers must be comma-separated, e.g., `form_1:1,2,3`.

Descriptive Popups

Link Text - Text that will be displayed as a hyperlink (should match an existing word or phrase on the form/survey)

Multiple Chronic Conditions

Popup Text - Rich text to be displayed as the popup's content

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***CMS Chronic Conditions:**

Alcohol Abuse, Alzheimer's Disease & Related Dementia, Autism Spectrum Disorders, Cancer (Breast, Colorectal, Lung and Prostate), Chronic Kidney Disease, Chronic Obstructive Pulmonary Disease, Depression, Diabetes, Drug Abuse/Substance Abuse, Heart Failure, Hepatitis (Chronic Viral B&C), HIV/AIDS, Hyperlipidemia (High Cholesterol), Hypertension (High blood pressure), Osteoporosis, Schizophrenia & other Psychotic Disorder, Stroke.

Main Display Options:

Link Color - Click on the picker to select a color:

☒ Display on Data Entry Forms ☐ Display on Surveys

Additional Options:

Activate on specific instruments/surveys - You may select specific instruments/surveys for which this popup will be active for

Patient Screening Form
Caregiver Screening Form
Patient Contact
Caregiver Contact

Activate on specific page numbers (for surveys only) - This option should be active. If no survey page numbers are specified, this popup should be active for all pages. Pages for each instrument must be defined on a new line.

patient_screening_form:

2. Multiple Chronic Conditions (≥2) as defined by Centers for Medicare and Medicaid Services (CMS)*

***CMS Chronic Conditions:**

Alcohol Abuse, Alzheimer's Disease & Related Dementia, Arthritis (Osteoarthritis and Rheumatoid), Asthma, Atrial Fibrillation, Autism Spectrum Disorders, Cancer (Breast, Colorectal, Lung and Prostate), Chronic Kidney Disease, Chronic Obstructive Pulmonary Disease, Depression, Diabetes, Drug Abuse/Substance Abuse, Heart Failure, Hepatitis (Chronic Viral B&C), HIV/AIDS, Hyperlipidemia (High Cholesterol), Hypertension (High blood pressure), Osteoporosis, Schizophrenia & other Psychotic Disorder, Stroke.

c. Coronary angiography with positive physiologic testing (FFR ≤0.80 or iFR ≤0.89)

** must provide value*


Data Dictionary and Codebook

Improved Data Dictionary Page

This module may be used for making changes to the project, such as adding new fields or modifying existing fields, by using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.

↓ STEP 1: Download the Data Dictionary

Download your current data dictionary OR the version of data dictionary with drafted changes. Data dictionaries are stored in CSV format. Also, you can download those CSV files with different delimiters: Comma (,), Tab or Semicolon (;)

 Download Data Dictionary ▼

✎ STEP 2: Edit the Data Dictionary

Edit your data dictionary, and save it in CSV format with any delimiter: Comma (,), Tab or Semicolon (;).

Need some help? If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demonstration file](#), or you may view the [Data Dictionary Tutorial Video \(10 min\)](#). For help setting up your Data Dictionary, you may also see the instructions listed on the [Help & FAQ](#).

↑ STEP 3: Upload your Data Dictionary file (CSV file format only)


Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. Once your file has been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the formatting in your Data Dictionary is correct before official changes are made to the project.

Snapshot note: A snapshot of your project's current Data Dictionary will be created automatically during the Data Dictionary upload process before committing the new Data Dictionary. The snapshot can later be accessed and downloaded from the Project Revision History page.

Format for min/max validation values for date and datetime fields: MM/DD/YYYY or YYYY-MM-DD ▼

CSV delimiter of data file: Comma (,) ▼

Browse... No file selected.

 Upload File

Improved Codebook Page

Find field

Field finder:

Search by variable name or by keyword in field label



— When viewing this page, collapse: ☐ all fields ☐ all additional tables

Set viewing preference

Instruments <input checked="" type="checkbox"/>			Events <input checked="" type="checkbox"/>	
Instrument	Form Name	Events	Event Name	Unique event name
Demographics	demographics	event_1_arm_1	Event 1	event_1_arm_1
Female Survey	female_survey	event_1_arm_1	Event 2m	event_2m_arm_1
Male Survey	male_survey	event_1_arm_1	Event 3m	event_3m_arm_1

Link to forms

Collapse all instruments

	#	Variable / Field Name	Field Label <i>Field Note</i>	Field Attributes (Field Type, Validation, Choices, Calculations, etc.)				
Instrument: Demographics (demographics) Enabled as survey ^ Collapse								
	1	[record_id]	Record ID	text				
 	2	[sex]	Sex	radio <table><tr><td>1</td><td>Female</td></tr><tr><td>2</td><td>Male</td></tr></table> Field Annotation: @p1000lang{"English":"eng test","Spanish":"spanish test"}	1	Female	2	Male
1	Female							
2	Male							
 	3	[languages]	languages	radio <table><tr><td>1</td><td>English</td></tr><tr><td>2</td><td>Spanish</td></tr></table> Field Annotation: @HIDDEN	1	English	2	Spanish
1	English							
2	Spanish							

Links to edit field or branching logic in online designer


Alerts and Notification

Automatic Survey Invitation

Alerts and Notification

Automated Survey Invitation

- New "Test Run" option when re-evaluating Alerts and Automated Survey Invitations


 **Test Run mode is enabled:** Selected alerts will be re-evaluated in a sandbox-like environment, which will allow you to view which records **would be** affected by the re-evaluation **without actually sending or scheduling any alerts**. With the test run enabled, no records will be affected during the re-evaluation.

Select alerts below to re-evaluate their conditions: [Check All](#) [Uncheck All](#) **Enable Test Run?**

☒ Alert #1: Send survey queue link (A-175)


☒ Alert #3: Six Minute Walk Training (A-291)



 **Test Run mode is enabled:** Selected surveys will be re-evaluated in a sandbox-like environment, which will allow you to view which records **would be** affected by the re-evaluation **without actually sending or scheduling any invitations**. With the test run enabled, no records will be affected during the re-evaluation.

Select surveys below to re-evaluate their ASI conditions: [Check All](#) [Uncheck All](#) **Enable Test Run?**

☒ Site Name



Randomization

Randomization New Features

- Multiple randomizations in a project
- Blinded randomization support
- New smart variables – [rand-number], [rand-time], [rand-utc-time]
- Real-Time Trigger Logic
- Option to copy randomization model settings when copying project

Learn more! Sign up for REDCap 301 training, 5/13/25:

<https://redcap.med.yale.edu/surveys/?s=MDWJHJNY8C3Y7RXK>

Bulk Record Delete

Bulk Record Delete

- Purpose
 - Delete multiple records or delete data for multiple instruments across multiple records.
- How it works
 - Access from ‘Other Functionality’ page or ‘Multi-record actions’ button on the record status dashboard page.
 - Requires “Delete Records” and “View and Edit” instrument level privileges.
 - All deletions made are PERMANENT and IRREVERSIBLE.
 - Export a copy of the project data to save as backup before making any deletion.
 - This functionality is currently disabled on all Standard servers. Contact us if you need to use this feature.

Bulk Record Delete

✕ Bulk Record Delete

You may use this page to delete multiple records from the project or alternatively to delete data for multiple instruments across multiple records. To perform either of these two actions, you must have "Delete Records" privileges. For the partial delete option, you must additionally have "View & Edit" instrument-level privileges for the instrument that you select. Make your selections below, and then click the "Delete" button.

! Please be advised that all deletions made here are **PERMANENT** and **IRREVERSIBLE**.

Step 1: Choose between deleting entire records or deleting data from specific instruments of selected records

- ☒ Delete entire records
- ☐ Partial delete (instrument-level data only)

Step 2: Choose between entering a custom list of records to delete or individually selecting records from a list

- ☒ Enter a custom list of records
- ☐ Select records from a list

Step 3: Enter records to delete 0

Enter a comma-separated or return-separated list of record names.

Bulk Record Delete

✖ Bulk Record Delete

You may use this page to delete multiple records from the project or alternatively to delete data for multiple instruments across multiple records. To perform either of these two actions, you must have "Delete Records" privileges. For the partial delete option, you must additionally have "View & Edit" instrument-level privileges for the instrument that you select. Make your selections below, and then click the "Delete" button.

⚠ Please be advised that all deletions made here are **PERMANENT** and **IRREVERSIBLE**.

Step 1: Choose between deleting entire records or deleting data from specific instruments of selected records

- ☐ Delete entire records
- ☒ Partial delete (instrument-level data only)

Note: Selecting all instruments will not actually delete the records, but will leave the records with a gray form status for all instruments.

Select the instruments to delete for the records specified below in Step 2. ▲

[select all](#) [deselect all](#)

- ☐ **Event 1**
- ☐ Form 1
- ☐ **Event 2**
- ☐ Form 1

Step 2: Choose between entering a custom list of records to delete or individually selecting records from a list

- ☐ Enter a custom list of records
- ☒ Select records from a list

Step 3: Select records to delete 0

Check the checkbox next to each record you wish to delete below.

[select all](#) [deselect all](#)

Search records...

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

User Rights

User Rights New Feature

- New Read Only user privilege for the User Rights page
 - Users and roles can now be given Read Only access to the User Rights page, which will allow users to view the page but not be able to take any actions on the page.

Note: If a user is in a Data Access Group (DAG) while viewing the page, they can still only view users from their own DAG.

MyCap

MyCap New Features

- MyCap Settings Page in the Online Designer
 - MyCap tasks can be manually set as Active or Not Active at any time
- Mobile Toolbox (MTB) measures for use in the MyCap mobile app.
 - MTB is a research platform that includes a library of cognitive and other tests that can be administered remotely on a smartphone.
 - The MTB's measures include smartphone versions of assessments from the NIH Toolbox, the International Cognitive Ability Resource, and the Patient Reported Outcomes Measurement Information System.
 - A list of all available MTB tasks in REDCap can be viewed via the "Import Active Task" button in the Online Designer for any MyCap-enabled project.
- MyCap supports repeating instrument functionality for longitudinal projects.

Thank You!

Further Questions: Contact us at
REDCap@yale.edu