



DFdiscover 2025 Release Highlights: Smarter Workflows + Enhanced ePRO

12 December 2025

Questions

Use the Chat feature in Teams at any time to ask questions or share feedback.

Recording

You'll receive a link to the webinar recording via email after the event.

Resources

Check out previous webinars and more about DFnet at <https://dfnetresearch.com>

Voices in Today's Webinar

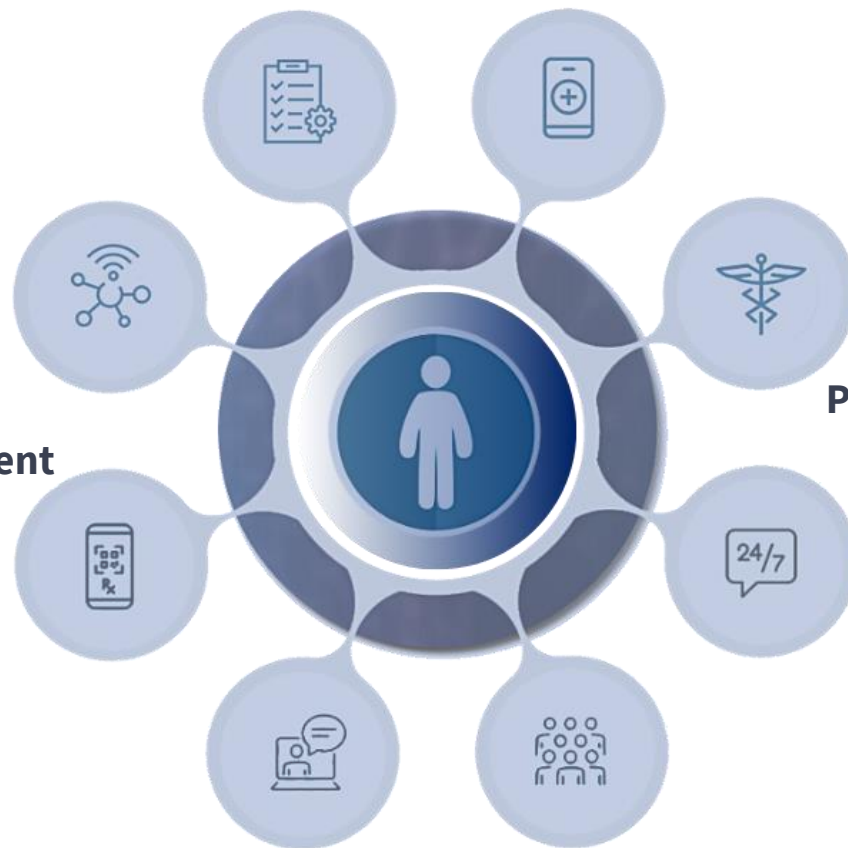


Amy Apostoleris
DFnet CEO
United States



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DFnet Product Manager
Canada

A Modular eClinical Suite for Complex Studies



Patient Engagement

Patient-Site Centered Support

Digital Analytics and Insights

Site/Sponsor dashboards, anomaly detection, alerts; patient-level details; remote monitoring

DFengage ePRO

Assessments/Patient Diary
ePRO/eCOA collection with guided experience

Social Determinants (SDOH)
Capture socio-economic factors, housing, nutrition, transportation, safety needs, etc.

Medication Adherence
Manage and track medications including schedules and reminders

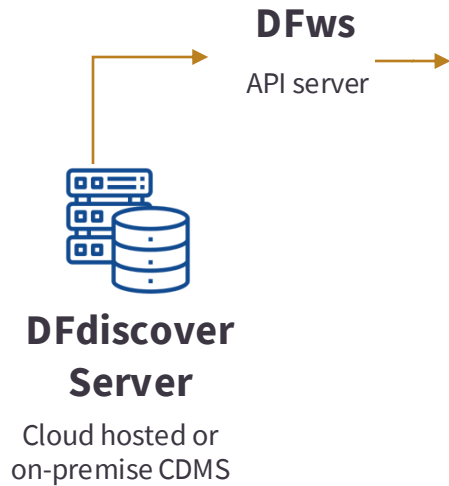
Calendar/Scheduling
Appointments, visit schedule, with real-time reminders via any channel (SMS, email, mobile)

DFweb, DFcollect and DFengage

Online/Offline Capabilities
Providing patients, HCPs, investigators with disease and protocol specific data resources before, during, after study

eConsent, IRT, Payments, Drug Supply, eTMF
Providing sponsors, patients, HCPs, investigators with disease and protocol specific resources before, during, after study

Real-time Notifications
Proactive messages and reminders of upcoming medications, coaching tasks, events etc. via any channel (SMS, email, mobile)

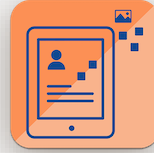


Web and mobile apps



DFweb

Web app for browser-based EDC



DFcollect

Tablet app for online/offline EDC



DFengage

Web & mobile app for study participants



DFsources

Mobile app for source document submission

Desktop apps



DFexplore

Data collection and management



DFsetup

Study setup and configuration



DFadmin

User, study, and server admin



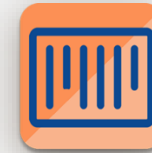
DFATK

Acceptance Test Kit



DFsend

Submit scanned paper CRFs



DFbarcode

Create barcodes for paper CRFs

Client-side CLIs: DFattach, DFaudittrace, DFbatch, DFexport, DFpass, DFpdfpkg, DFreport, DFuserPerms

DFdiscover 5.10 includes:

- Server & API
- Desktop apps
- DFweb
- DFcollect

DFengage 2.4 includes:

- DFengage Mobile
- DFengage Web

New Features & Improvements in **DFdiscover 5.10** and **DFengage 2.4**

DFengage Updates

- ✓ DFengage Web App Available via Web Browser
- ✓ Streamlined Participant Login Flows
- ✓ Forgot Password & 2FA Support
- ✓ Reminder for Unsynchronized Activities
- ✓ Support for Repeating Scheduled Activities

ePRO Management

- ✓ ePRO Management in DFweb
- ✓ Secure ePRO User Database & Logging
- ✓ Participant Activity Reminders via Email
- ✓ DFengage ePRO Configurations

EDC Enhancements

- ✓ Expanded eCRF Question Text Character Limits
- ✓ Repeating Visit Folder Option in DFexplore
- ✓ Field Navigation Taskbar Option for Touch Screens
- ✓ Strengthened DFweb & DFcollect Permissions

Additional Updates

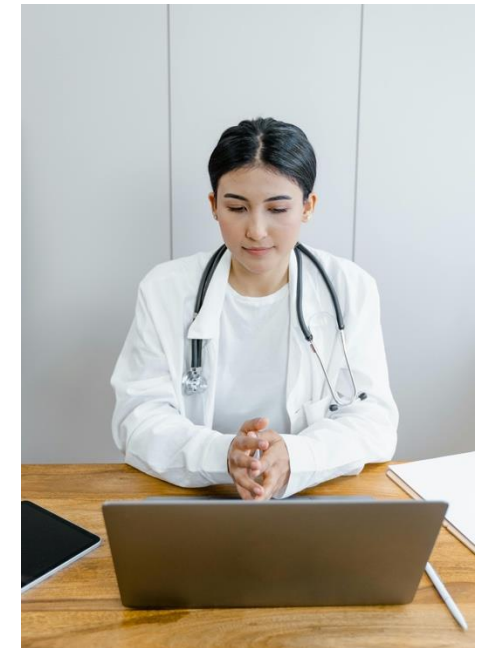
- ✓ Setup Import Enhancements
- ✓ Sensitive Data Encryption at Rest
- ✓ User Profile Data Encryption at Rest
- ✓ Security & Performance Improvements



DFengage

Engaging Patients with **DFengage**

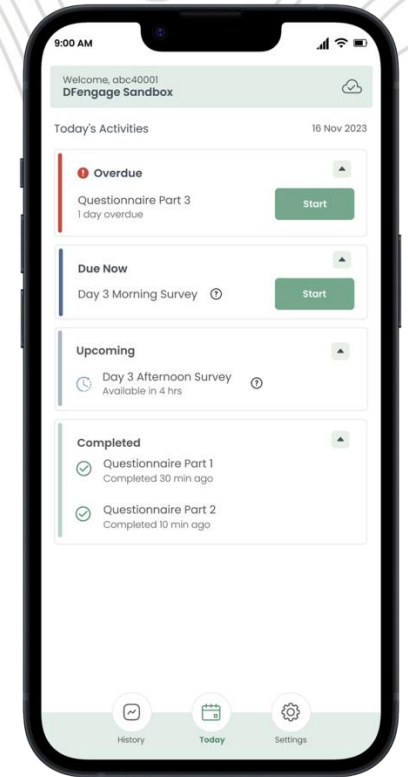
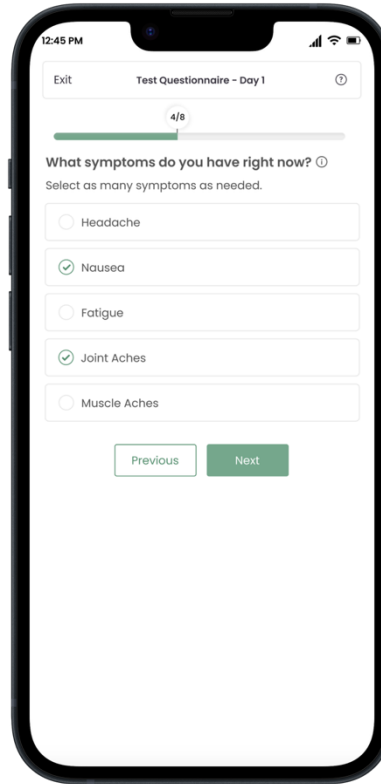
- **Why it Matters:** Engaged patients lead to better data quality, improved adherence, and more meaningful outcomes
- **Beyond Participation:** Patients aren't just subjects – they are partners who shape study design, improve relevance, and enhance trust
- **Driving Impact:** Centering patients ensures research reflects real-world needs, accelerates innovation, and improves health equity
- **Reduce Patient Burden:** Use technology to allow patients to contribute to research from where-ever they are





DFengage ePRO Features

- Easy-to-use app for research participants
- Collect symptoms, daily outcomes, questionnaires, study diaries, surveys
- Participants enter data from their own device (BYOD or provisioned)
 - In their chosen language
 - From anywhere – online or offline
- Real-time study team access to ePRO data
- Available on the web & as a mobile app on Android and iOS
- Fully integrated with DFdiscover platform



New in DFengage 2.4

DFengage on the Web



The screenshot displays the DFengage web interface for a user named 's20p10007'. The header includes a 'Logout' button. Below the header, there are navigation tabs for 'Today', 'History', and 'Settings'. The main content area is titled 'Today's Activities' for '22 Oct 2025'. It is divided into three sections: 'Overdue', 'Due Now', and 'Upcoming'. The 'Overdue' section shows an 'eDiary (Day 1)' that is 7 hours overdue, with a 'Start' button. The 'Due Now' section shows a 'Morning Survey (Day 2)' and an 'eDiary (Day 2)', both with 'Start' buttons. The 'Upcoming' section shows an 'Afternoon Survey (Day 2)' available in 2 hours and an 'Evening Survey (Day 2)' available in 7 hours. A 'Completed' section is visible at the bottom but is currently empty.

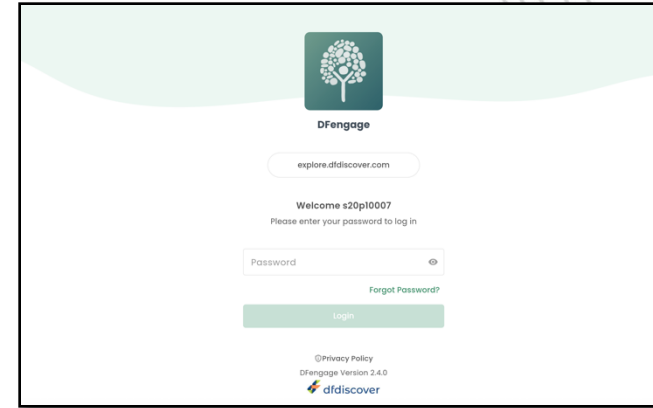
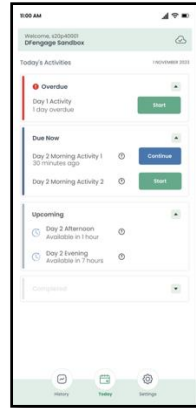
Participants complete study activities without downloading an app

Invitation links simplify access & login

Differences from mobile app:

- Online only
- No PIN (password required)
- No activity data saved between login sessions
- Reminders sent via email

When to use DFengage mobile or web?



Mobile best when:

- Activities are frequent (e.g., daily surveys)
- Internet connection not always available
- Simpler access with PIN (vs. password)
- Push notifications help increase patient engagement

Web best when:

- ▶ Activities are infrequent (e.g., once; every few weeks)
- ▶ No internet connectivity limits
- ▶ Preference not to install an app
- ▶ Email-based reminders sufficient for patient engagement

DFengage Mobile vs. Web



Key functionality is the same between web and mobile, with a few differences:

Feature	DFengage mobile	DFengage web
Complete scheduled activities online	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Complete scheduled activities offline	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> internet connection required
Set PIN for easy login	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> password required for each login
Streamlined invitation workflow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forgot password & two-factor authentication	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Offline notifications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> notifications sent via email
Push notifications	<input checked="" type="checkbox"/> no email required	<input checked="" type="checkbox"/> notifications sent via email
Notifications in participant's local time	<input checked="" type="checkbox"/> sent using device time zone	<input checked="" type="checkbox"/> sent using server time zone
View history of completed activities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Unique ePRO accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accessible via web browser	<input checked="" type="checkbox"/> requires app installation	<input checked="" type="checkbox"/>
Requires installation on a phone/tablet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> no installation required

New in DFengage 2.4

Streamlined ePRO Login with Access Links



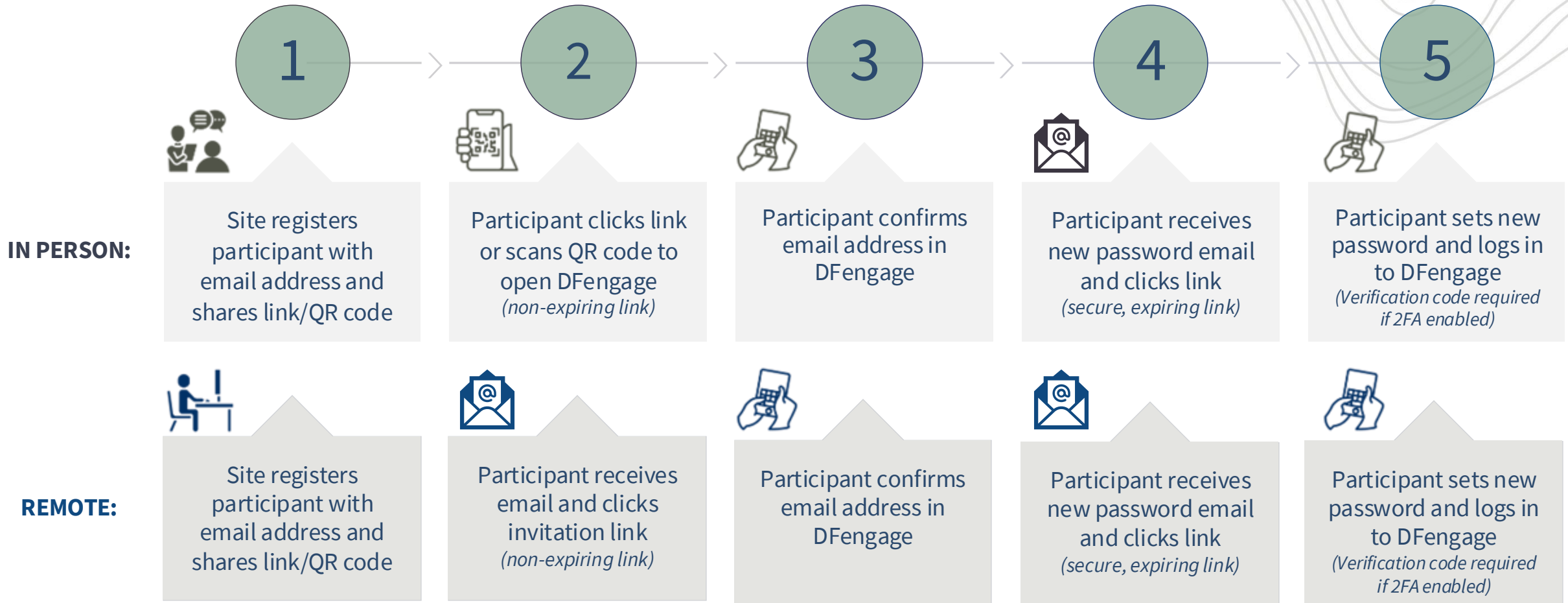
The screenshot shows a web interface for DFengage. At the top is the DFengage logo (a teal square with a white tree icon) and the text "DFengage". Below this is a welcome message: "Welcome slp1007" followed by "Please confirm your email address". There is a text input field labeled "Email Address". Below the input field is a large green button labeled "Confirm Email". At the bottom of the page, there is a link for "Privacy Policy", the text "DFengage Version 2.4.0", and the "dfdiscover" logo.

- During registration or when a new activity is available, system sends an email to participant with the appropriate access link
 - **Invite link:** Participant confirms email address and sets their password
 - **Login link:** Participant clicks link in email and enters their password to login
- Server, API, username all pre-defined in access link
- Links open DFengage mobile or web depending on device type
- Support for forgot password & 2FA

Requires DFdiscover server & API 5.10 or later

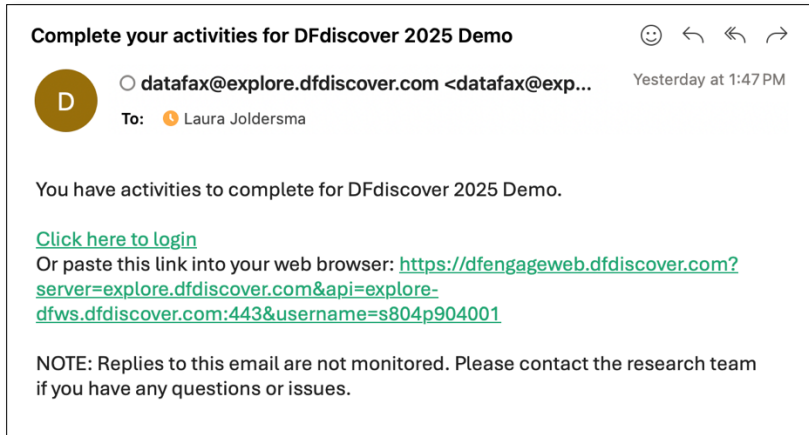
Streamlined Login

ePRO Onboarding Flow for Participants

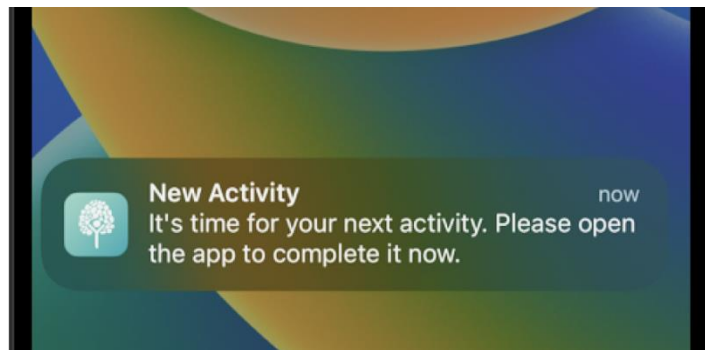




DFengage 2.4 Participant Reminders



Email reminder for DFengage Web



Push notification for DFengage Mobile

- New & overdue reminders for DFengage web:
 - **Email** sent to participant's registered address
 - Customizable template with link to DFengage (password required)
 - Sent as scheduled by system administrator using **DFeproreminders** program
- Reminders on DFengage mobile:
 - **Push notification** on participant's device
 - PIN required to open app (no password after initial login)
 - Offline notifications supported

Requires DFdiscover server & API 5.10 or later

Forgot Password for Participants



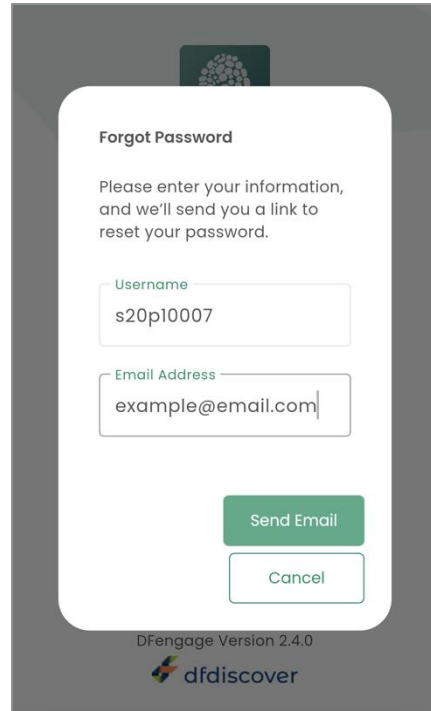
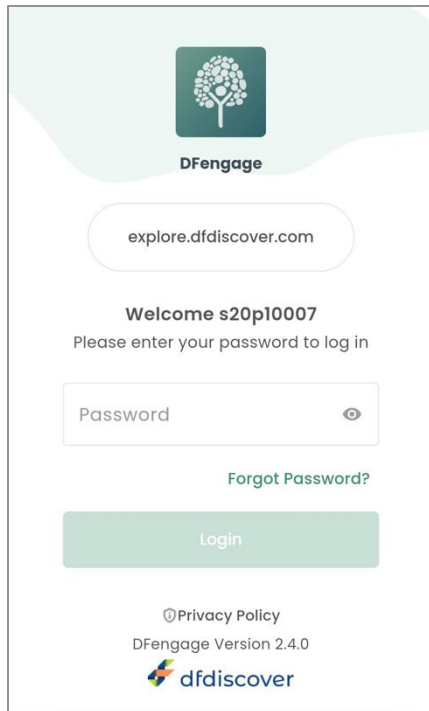
1. Click **Forgot Password** below the password field

2. Enter your username and email address, then click **Send Email**

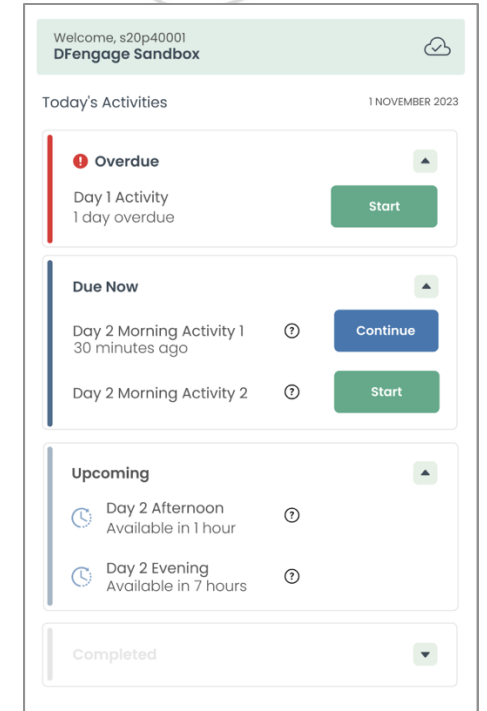
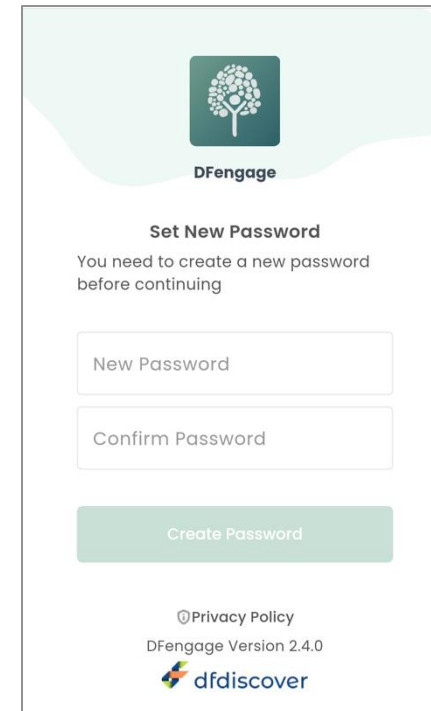
3. Find the email message **DFdiscover password reset** and click the link

4. Follow instructions for setting a new password

5. Now you're logged in to DFengage



- ▶ *Link expires after 30 minutes*
- ▶ *Requires the same browser & device as step 1-2*



Requires DFdiscover server & API 5.10 or later

DFweb 5.10

ePRO Management for Sites



DFweb

DFdiscover Demo User (demo) explore.dfdiscover.com

Site 1 - New York Search Import Download

ePRO Management 30 Total Registered

Overdue 2 Due Now 5 Complete 10 Upcoming 13 Inactive 70

Click on a row to view or edit subject details Showing 100 of 100

Subject	Username	Status	Name	Contact	Last Sync	
10001	s22p10001	Due Now	John Smith	johnsmith@gmail.com	Sep 10, 2025 10:05 UTC-00:00	View Data >
10002	s22p10002	Complete	Jane Jackson	jane@email.com	Aug 24, 2025 12:13 UTC-00:00	View Data >
10003	s22p10003	Inactive		Register >		View Data >
10004	s22p10004	Registered	Adam Jones	jonesa@hotmail.com		View Data >
10002	s22p10005	Overdue	Gabriel Alan	gal989@gmail.com	Sep 1, 2025 16:35 UTC-00:00	View Data >
10006	s22p10006	Upcoming	Paula Tucker	ptucker@mail.com	Sep 3, 2025 19:47 UTC-00:00	View Data >
10007	s22p10007	Inactive		Register >		View Data >

New DFweb page for site staff to securely register and support ePRO participants

Access permission controls by user via DFadmin:

- ePRO manager (*full access*)
- ePRO monitor (*view access, with PII*)
- ePRO viewer (*view access, no PII*)

ePRO user profile data encrypted and not accessible in DFadmin

Requires DFdiscover server & API 5.10 or later

DFengage ePRO Configurations & Setup

Important steps for system & study administrators:

1. Define DFengage web FQDN in **DFedcservice.cf**
2. Create **dfeproagent** user account in **DFadmin** & configure **DFpass**
3. Customize ePRO registration in **DFsetup** (*optional*)
4. Customize email templates in **DFmsgtemplates** file (*optional*)
5. Create **ePRO user accounts** via bulk accounts function in **DFadmin**
6. Assign **ePRO Admin** permissions in **DFadmin** to sites, monitors, study team
7. Schedule **DFeproreminders** to send participant emails

Full details in the release highlights & user guides



Demo

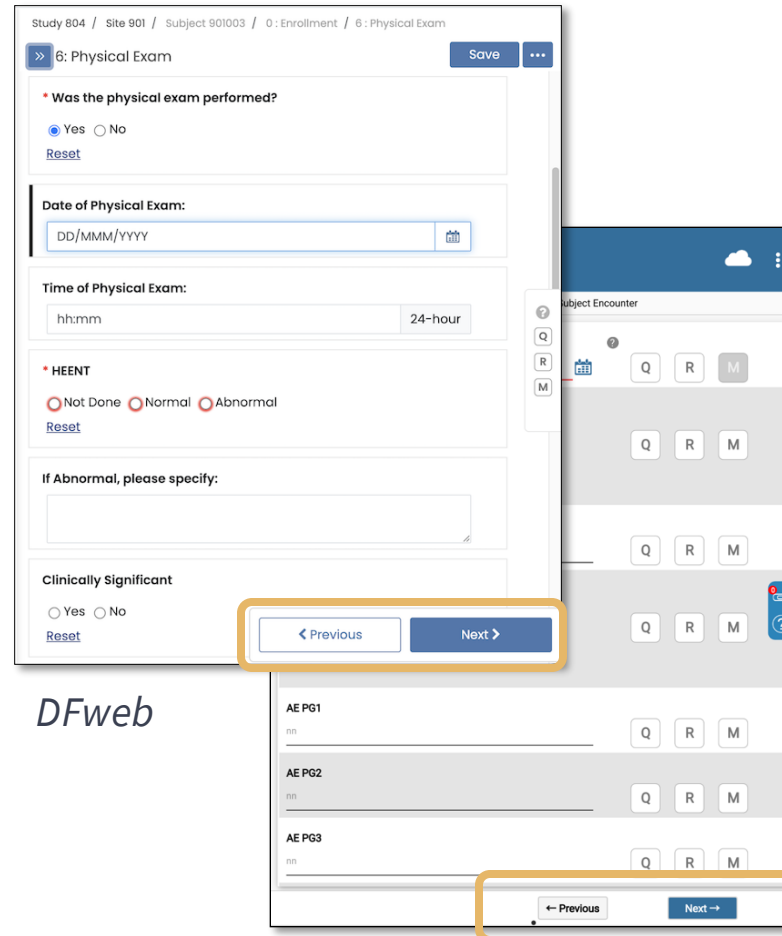


Additional Updates

Field Navigation Taskbar

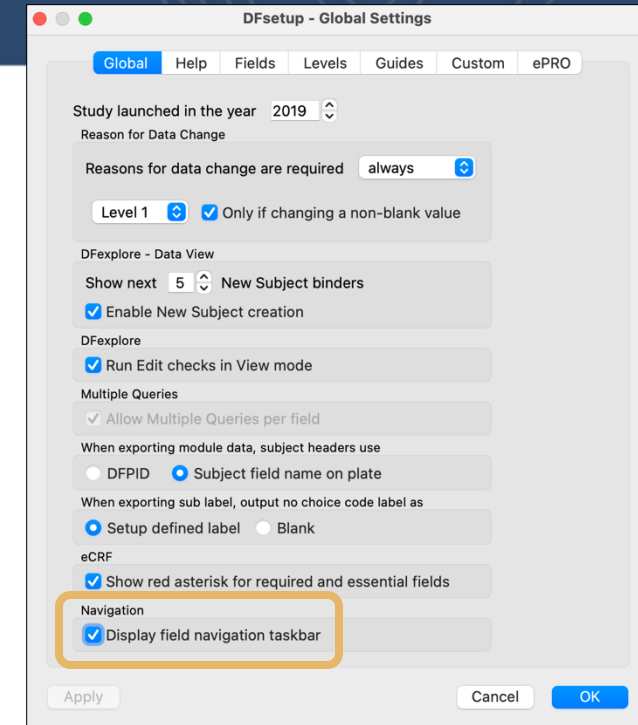


- Previous & Next buttons available on bottom right of CRF to navigate across fields
 - No need to manually select next field
 - Helps with skip logic & dynamic field visibility
 - Moves between fields on the current page (not across pages)
- Available in **DFcollect** and **DFweb** only to support touch screen use on tablet/phone
- Additional setting to display on larger screens in **DFweb**



DFweb

DFcollect



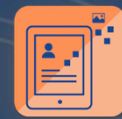
Enabled in **DFsetup** via Global settings



Additional user setting in **DFweb**



DFweb



DFcollect



DFadmin

DFweb & DFcollect Role Permissions

- Important updates to DFweb & DFcollect role permission requirements to align access across EDC tools
- The following **DFexplore** permissions also apply to **DFweb** & **DFcollect**:
 - DFexplore Views - Dashboard: Allows access to Dashboard page
 - DFexplore Views - Data: Allows access to Subjects page, CRF view, and Tasks page
 - DFexplore Views - Queries: Allows access to Queries page
 - DFexplore Views - Reports: Allows access to Reports page (*DFweb only*)
 - DFexplore Print/Save - Images: Allows document download in Manage Documents dialog in CRF view
 - DFexplore Print/Save - Reports: Allows reports download in Reports view (*DFweb only*)

Ensure role permissions are accurate before upgrading to version 5.10



Increased Question Text Limits on eCRFs

- Increased character limits for field prompts & table cells from 256 to 1500 (including any HTML code used for formatting)
- Allows for longer question text on eCRFs, with or without tables
- Supported in **DFexplore** and **DFweb**
- **DFcollect** field prompts:
 - Multi-line prompts up to 1500 characters supported for choice, check, VAS type fields only
 - Field prompts are restricted to a single line for string, date, time, and number type fields

▼ Inclusion Criteria			
Inclusion Criteria		Yes	No
Inclusion #1	Age 18 to 75 years, inclusive, at the time of informed consent	<input type="radio"/>	<input type="radio"/>
Inclusion #2	Confirmed diagnosis of Type 2 Diabetes Mellitus (T2DM) for at least 12 months prior to screening, based on medical history and clinical records.	<input type="radio"/>	<input type="radio"/>
Inclusion #3	HbA1c between 7.0% and 10.5% at screening, measured using a certified laboratory method.	<input type="radio"/>	<input type="radio"/>
Inclusion #4	Body Mass Index (BMI) between 25 and 40 kg/m ² , inclusive.	<input type="radio"/>	<input type="radio"/>
Inclusion #5	Stable dose of metformin monotherapy for at least 12 weeks prior to screening. No changes to dosing or addition of other antihyperglycemic agents during this period.	<input type="radio"/>	<input type="radio"/>
Inclusion #6	Participant must demonstrate the ability and willingness to comply with all study procedures, including attending scheduled clinic visits, completing study-related questionnaires, undergoing laboratory assessments, and adhering to study medication requirements for the entire duration of the trial (anticipated to be approximately 1 year). In addition, the participant must have reliable access to a telephone or electronic communication device for follow-up contact and must be able to understand and communicate in English to ensure accurate data collection and informed participation.	<input type="radio"/>	<input type="radio"/>



Repeating Visits in Subject Binder

- Simplify subject binder navigation
- New visit map setting for repeating visits that use a visit number range
- Optionally display key data points in page label, making specific AEs, con meds, or med hx easier to find (using page map label substitutions)

Adverse Event

- AE 01 04/OCT/2023 TIA
- AE 02 19/NOV/2023 Headache
- AE 03 03/JAN/2024 Bruise

Adverse Event

Concomitant Medication

- CM 01 Tramadol (10/OCT/2023)
- CM 02 Ibuprofen (19/NOV/2023)

Concomitant Medication

Supported in **DFexplore only** in this release

Available in DFweb and DFcollect in a future release

Enabled via new visit map property in **DFsetup**

Visit or Cycle Definition

Type

Visit Cycle

O: Optional

Combine visit range into one folder in subject binder

Visit Date Field

(none)

Visit Scheduling

Visit is due 0 days after baseline

Visit is overdue when 0 days late

Plates

Required 30

Optional

Display Order

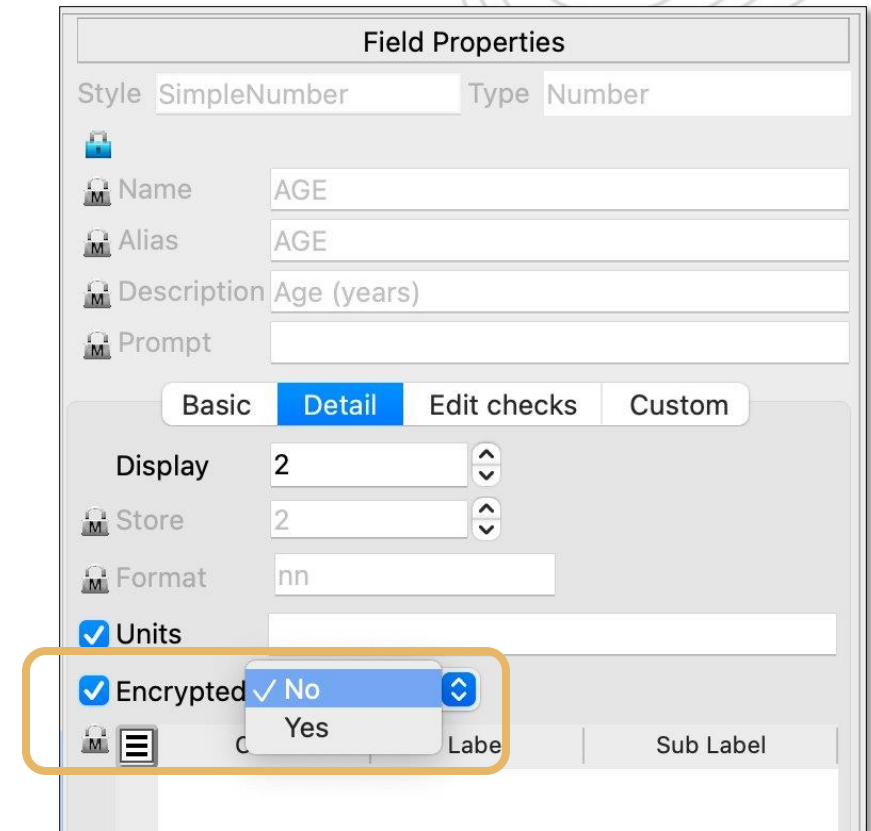
Missed Visit



Security Enhancements

Encryption at Rest for Sensitive Data

- Specific data fields can be encrypted at rest using the new **Encrypted** field property
 - SSN, phone, DOB, medical conditions, etc.
 - Available for string, number, and date fields
 - Not available for choice, check, VAS, time fields
- Field values are encrypted before saving to database & decrypted when read or exported using DFdiscover apps
- Maximum of 250 characters allowed for encrypted fields
 - Data records with encrypted values require more storage
- Same strong encryption algorithm as SSL (AES 256)



*Enabled via new field property in **DFsetup***



DFsetup: Import Setup Enhancements

- **Streamlined setup imports** from Excel, JSON, or another study
- **Interactive conflict resolution** for controlled merging of setup changes
- **Visual indicators** for added or retained fields
- **Improved usability and transparency** when importing into existing studies
- **Supports changes** to existing styles, modules, and fields (not yet changes to existing plates)

DFsetup - Difference Table

Resolve conflicts by choosing which value to keep. You can select values directly in the table, or use the checkboxes to keep all Current or all Import values.

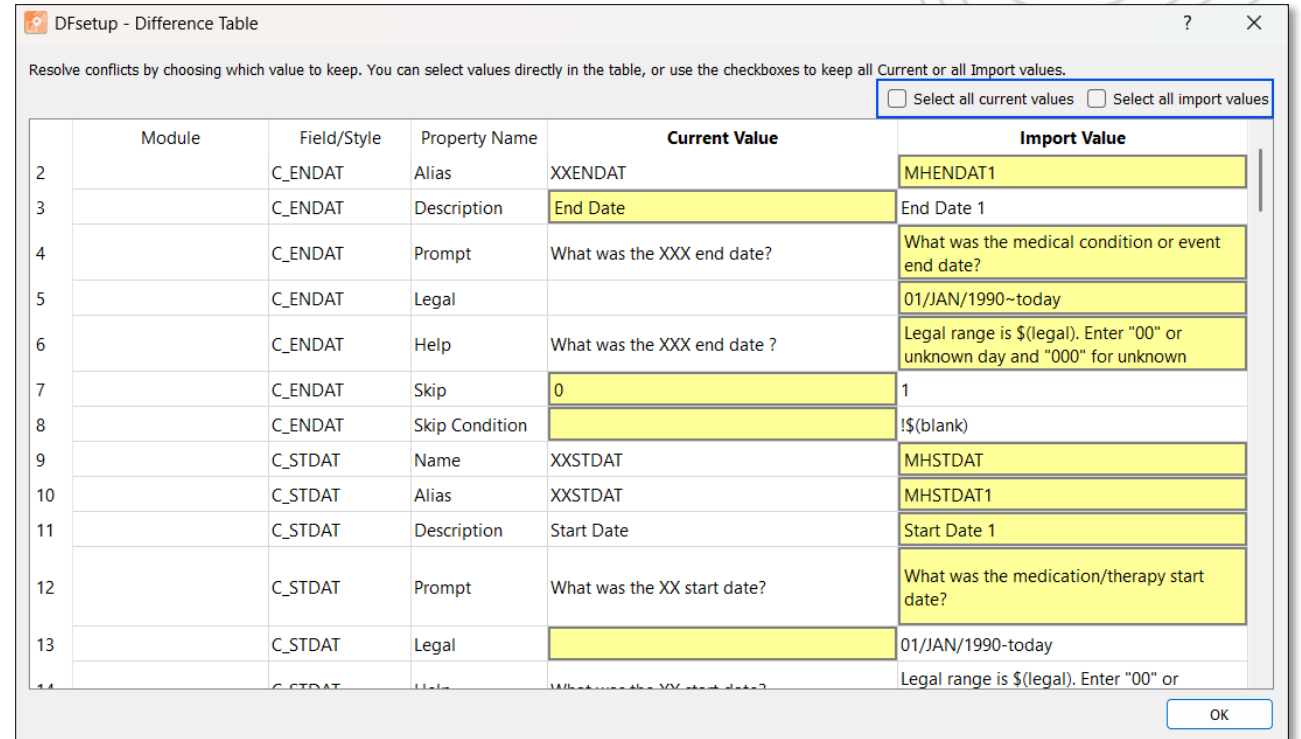
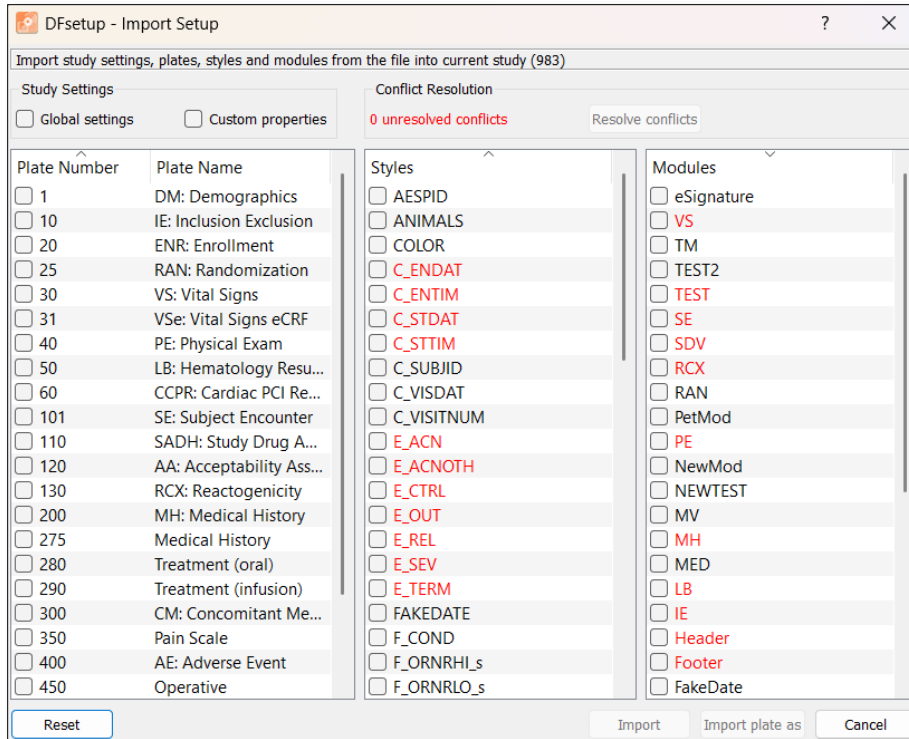
Select all current values Select all import values

	Module	Field/Style	Property Name	Current Value	Import Value
1	eSignature	SigLTimestamp			{ADD FIELD}
2	eSignature	SigReason			{ADD FIELD}
3	Header		Description		Header Module
4	Header	SCRNID			{ADD FIELD}
5	Header	VISITNUM	Alias	VISITNUM_\$(plate)	VISITNUM
6	Header	VISITNUM	Description	Visit Code	Visit Number
7	Header	VISITNUM	Prompt		Visit Number
8	Header	VISITNUM	Store	4	5
9	Header	VISITNUM	Format	nnnn	
10	Header	VISIT	Style	SimpleString	CDASHIG_String
11	Header	VISTYPE			{KEEP FIELD}
12	Header	SID			{ADD FIELD}
13	Header	SITEID			{ADD FIELD}
14	Footer		Description		Footer Module
15	Footer	VERNUM			{ADD FIELD}
16	Footer	INVRTIM			{KEEP FIELD}
17	Footer	VNDAT			{KEEP FIELD}

OK



Import Setup Enhancements Conflict Resolution & Difference Table



Number of conflicts shown in Import Setup dialog
 Click **Resolve conflicts** to view difference table

Difference table shows all style/module/field conflicts
 Select cells to **keep current value** or **replace with import value**

DFdiscover 5.10

Updates for Administrators

DFweb & DFcollect Updates

- **IMPORTANT:** All **DFcollect** users must upgrade to DFcollect 5.10 to connect to DFdiscover server/API 5.10
- Role permissions for **DFweb** & **DFcollect** now aligned with DFexplore
- Security updates for **DFweb**
 - Define CDNs allowed to provide HTML content (cdn.dfdiscover.com pre-defined)
 - Enable input validation for protection against XSS attacks in DFadmin – entered data may be adjusted for data security (optional per study)

Server/API Updates

- DFws API connections now require **TLS 1.3**
- User profile data now **encrypted at rest** in data storage
- New **server-level SSO only** option to require Microsoft login for all users (excludes DFengage)
 - With SSO, DFcollect does not work offline
- New **user-level SSO only** option to require Microsoft login for specific users (excludes DFcollect & DFengage)

Special Upgrade Steps

- Run **DFadmindb** utility to update DFadmin history database (ePRO user updates)
- Run **DFsetupdb** utility to update DFsetup history database (timestamp bug fix)

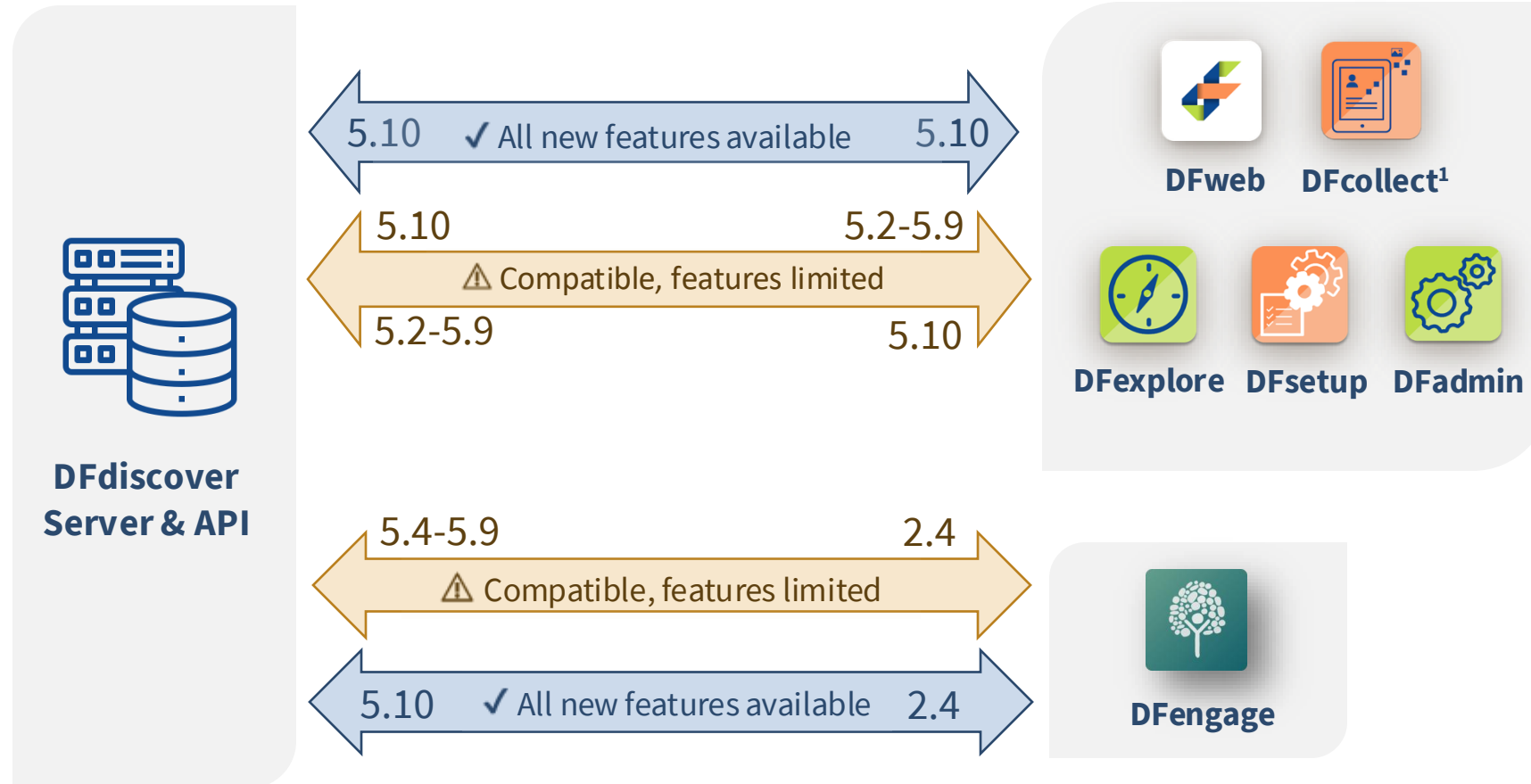
See the DFdiscover 5.10 release notes & release highlights for full details

Additional Updates

- New **Subject Schedule of Pages** standard report shows visit and plate need & status in a single view
- **Tabular listing reports** now display the number of results next to search field and supports optional pagination
- Printing multi-page eCRFs to PDF is improved: each eCRF page is now printed to its own PDF page when creating bookmarked PDFs and subject packages
- **User guides** in desktop apps now open in your web browser
- **DFsetup** now checks and displays a warning about mismatches with the server version
- More improvements and bug fixes, plus advance notices for upcoming changes around internal queries, XML setup export formats, and more – details in the **Release Notes**

Version Compatibility

DFdiscover supports backwards compatibility between server/API and client apps, but new features require the latest versions of both



DFadmin **Version Strict** setting controls app compatibility:

- Minimum version supported
- All minor versions supported
- Only current version supported

¹**NOTE:** DFcollect 5.9.4 or earlier **cannot connect** to DFdiscover 5.10 or later (TLS v1.3 requirement)

Learn More

DFdiscover 5.10

Release Notes: Details of all updates since 5.9, with table listing of all changes, known issues, advance notices, upgrade details

Release Highlights: Slide deck overview of new features and enhancements

User Guides: Detailed documentation for all apps

DFengage 2.4

Release Notes: Details of changes since DFengage 2.3

Training Slides: Comprehensive deep-dive on using & implementing DFengage

User Guide: Details for end users of DFengage

Setup & Admin Guide: Details for study teams implementing DFengage in their studies

Contents

- Release Highlights
 - ePRO Management
 - EDC Enhancements
 - Setup Import Enhancements
 - Server Config & A...
 - Additional Updat...
 - Known Issues & A...
- Upgrade Process

All Updates

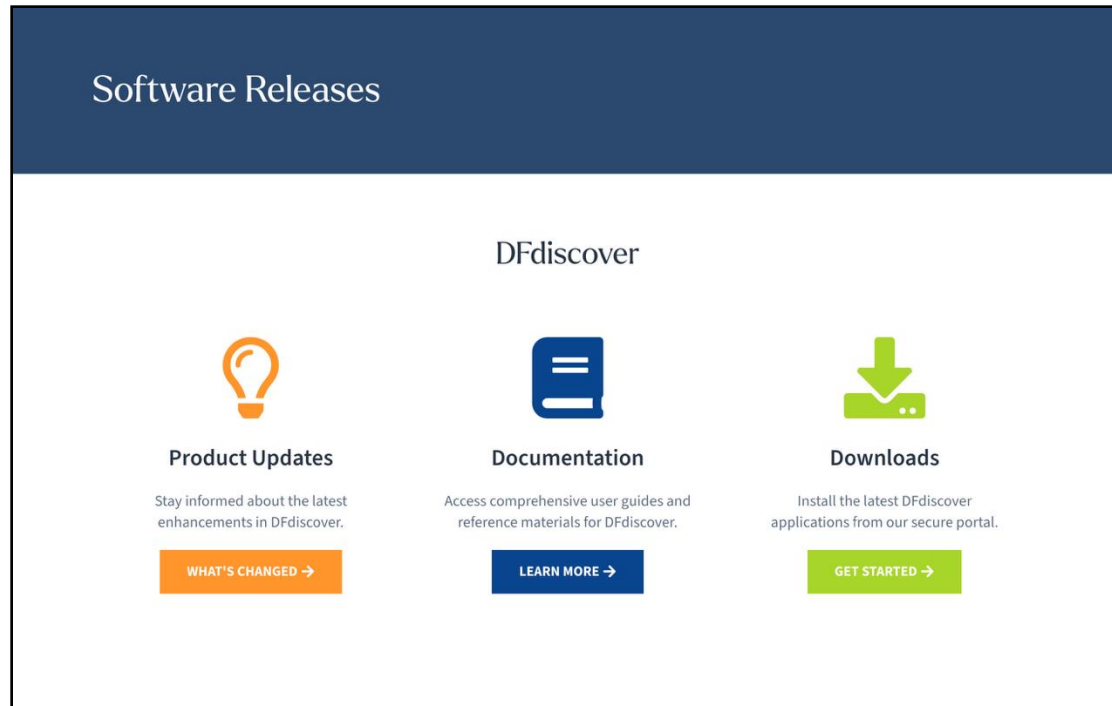
Order	ID	App	Type	Description
1	9915	Web	New	DFengage is now available as a browser-based web application as well as a mobile application. Essential functionality is the same between the two apps, with some differences. See details.
2	12035	Web & mobile	New	DFengage's login page has been updated to improve the participant experience and support trusts and login links shared with study participants via email using DFengage's ePRO Management page. See details.
3	9969	Web & mobile	New	DFengage now supports password reset functionality via the Forgot Password option on the login screen. Users must have an email address registered to their account to use this feature. See details.
4	12034	Web & mobile	Change	DFengage now supports two-factor authentication (2FA). Users must have 2FA enabled for their account and a registered email address to use this feature. See details.
5	10700	Web & mobile	New	DFengage now displays a red dot next to the History icon when there are any pending activities that have not been received by the server. See details.
6	11872	Web & mobile	New	DFengage now supports repeating activities, allowing a form to be collected multiple times in one day or within a time period. These are defined in the visit map with a visit number range with the S (Scheduled) visit type. See details.

Step 3: Confirm your email address

- This step confirms your registration
- Enter your email address provided to the research team
- Click **Confirm Email**
- This will verify your account and send you a link to set your password
- Find the email with subject line **DFdiscover password reset** and click the link in it

Previously, error messages could be missed. This has been reorganized to show all information again. We've also simplified the language for standard.

DFnet Website Updates



- Find software downloads, installers, and updates more easily
 - Redesigned **Software Releases** page (account required)
 - Latest resources linked from the **What's New** page (no account required)
- **Product Updates:** learn about the latest releases & patches
- **Documentation:** find user guides & release notes
- **Downloads:** get installers for desktop apps and servers



What's Next

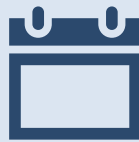
DFengage Patient Engagement

Connecting participants & site staff to enhance experience & support compliance



Custom Reminders

Keep participants notified of study events



Visit Calendar

Show upcoming visits & activities



Secure Messaging

Participants & site staff communicate on demand



Study Information

Share information and documents with participants

More Future Updates

- **Expanded web-based EDC:** Custom dashboards, multi-language support, data search, export
- **Text message (SMS) support:** For forgot password, TFA, participant reminders
- **Analytics and reporting:** Enhanced tools for reporting & oversight
- **Expand CTMS integrations:** eConsent, randomization & supply management, eTMF modules
- **Web-based study builder:** Build and administer your study on the web with AI
- **Ongoing updates:** Ensure security, compliance, performance, stability, and usability

Questions?

Use the chat to ask a question or unmute to join the discussion.

Scan the QR code to take our short survey:



- ✓ Explore **past webinars** at dfnetresearch.com
- ✓ Watch for the **webinar recording** and a brief survey in your email
- ✓ We're here to support your research. Contact us at info@dfnetresearch.com or help@dfnetresearch.com



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