



DFdiscover 2026 Release Highlights:

Custom ePRO Reminders + EDC Enhancements

18 June 2026

Questions

Use the Chat or Q&A 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>





DFdiscover 2026 Release Highlights:

Custom ePRO Reminders + EDC Enhancements

18 June 2026

Questions

Use the Chat or Q&A 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>

Today's Speakers



Emily MacKenzie

VP, Engineering and Services, DFnet

Canada



Laura Joldersma

Director of Product Management, DFnet

Canada

Meet Emily



- Joined DFnet in February 2026
- Overseeing Engineering, Product, and Study Management teams
- 25 years in Software Engineering roles
- Background in healthcare IT, diagnostic imaging, and VNA development
- Based in Waterloo, Ontario, Canada

June 2026 Release

DFdiscover 5.11 includes:

- Server & API
- Desktop apps
- DFweb
- DFcollect

Release date:
2026 June 08

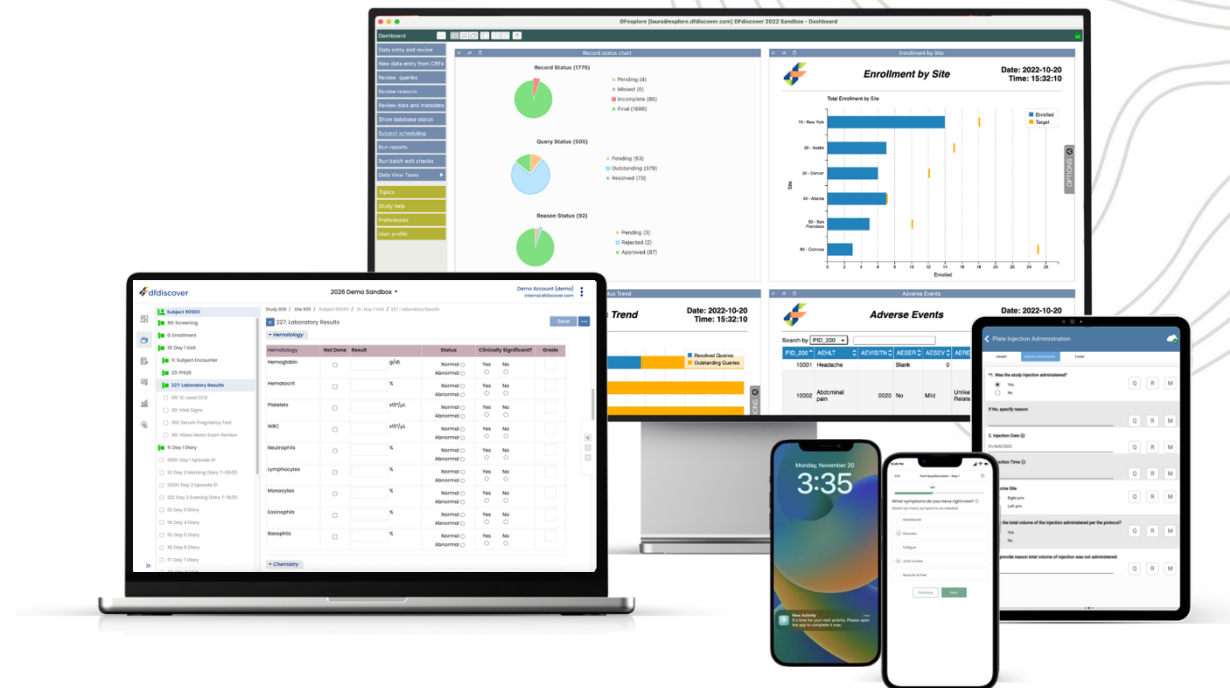
In production:
2026 June 13

DFengage 2.5 includes:

- DFengage Mobile
- DFengage Web

DFsources 1.0 receives a
maintenance update

REMINDER:
Organizations with
self-managed
DFdiscover servers
set their own
upgrade date



Thank you DFdiscover community for your feedback!

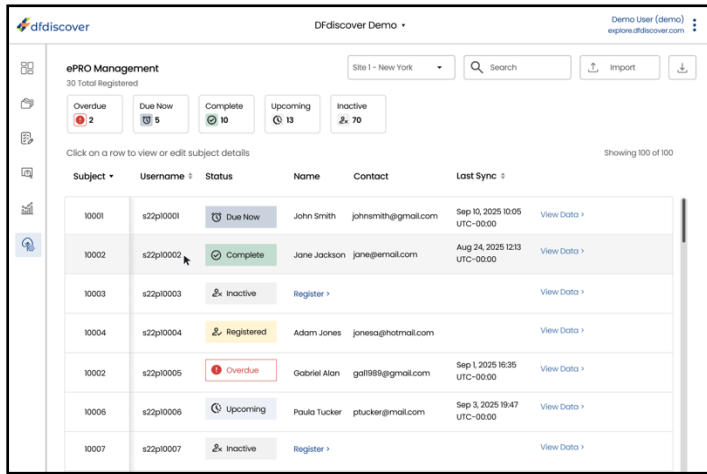
Your input helps shape our priorities for each release

Your questions, issues, & ideas help us make better products



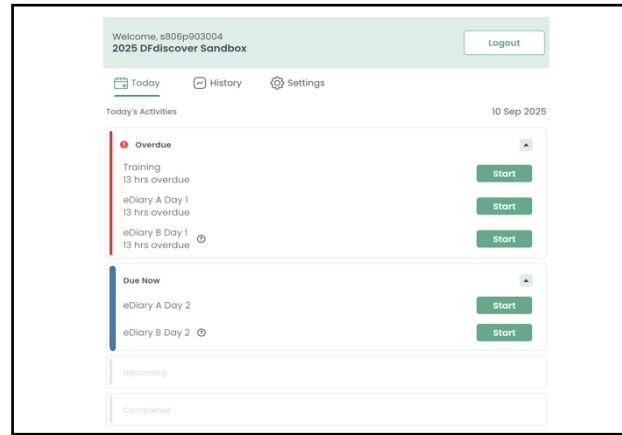
In Case You Missed It ...

Highlights from the November 2025 Release (DFdiscover 5.10 & DFengage 2.4)



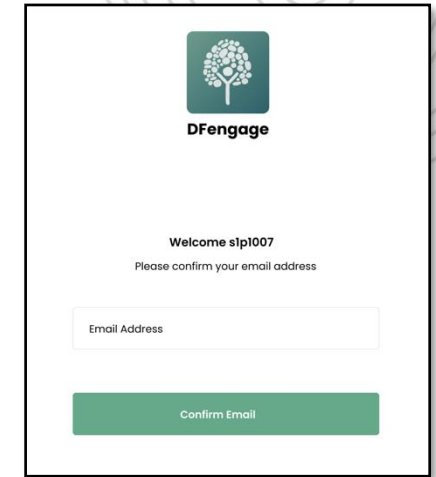
ePRO Management

New DFweb view for site staff to securely register, monitor, and support ePRO participants



Web-based DFengage ePRO

Participants complete questionnaires, surveys, and PROs without downloading an app



Streamlined ePRO Login

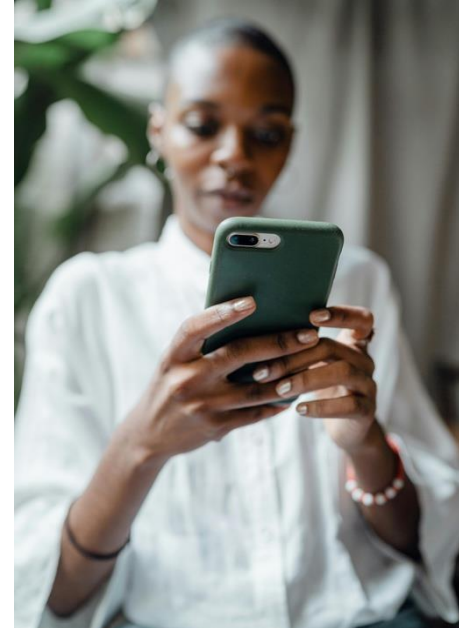
New invite & login flows, forgot password, two-factor authentication

Plus: EDC: Support for longer eCRF prompts & tables | DFexplore combined folder for repeating visits
Security: Field-level data encryption | User profile encryption | Per user/server SSO enforcement
Setup: Enhanced import from Excel/JSON

...and more

Engaging Patients in Clinical Research

- **Why it Matters:** Engaged patients lead to better data quality, improved adherence, and more meaningful outcomes
- **Beyond Participation:** Patients aren't just research 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



Release Highlights: June 2026

DFdiscover Version 5.11 & DFengage Version 2.5

DFweb

Disable Edit Checks Setting

Connection Issues Detection

ePRO Management Access
Links Update

DFcollect

Device OS Requirements
Update

DFengage

Custom Push Notifications in
DFengage Mobile

ePRO Notifications
Configuration in **DFsetup**

General EDC

eCRF & Subject Binder
Improvements

PDF & Image Conversion
Improvements

More Updates

Limited, Region-Specific SMS
Support for 2FA

Restrict Server Connections in
DFws API

Core Application Framework
Upgrade

Security & Maintenance
Updates



Custom ePRO Push Notifications in DFengage



dfengage

Custom Push Notifications for DFengage

- Improve participant engagement & protocol compliance with **custom ePRO reminders** in **DFengage mobile**
- Flexible notification **timing** to adapt to study requirements
- Study-specific notification **content** for each timepoint or for all activities
- Delivered through **push notifications** via DFengage mobile, online or offline
- **Multiple languages** supported

Requires DFengage version 2.5 and DFdiscover server & API version 5.11





dfengage

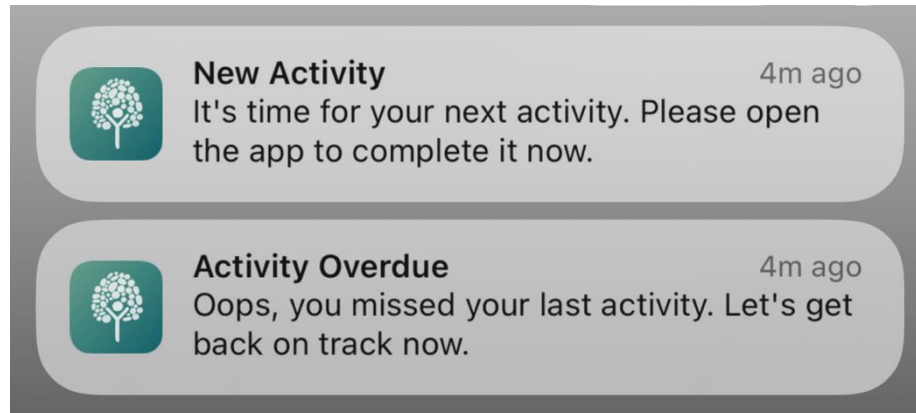
Generic vs. Custom ePRO Notifications

BEFORE

Same notification for all visits & studies

Limited notification timing

Notification sent & activity available at same time



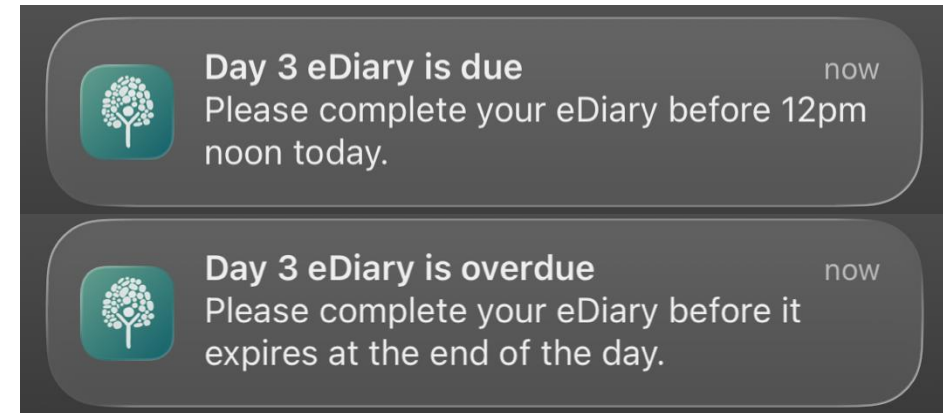
Generic ePRO Push Notifications

AFTER

Visit-specific notifications with custom messaging

Flexible notification timing options

Support for multiple notifications per visit



Example Custom ePRO Push Notifications

ePRO Notification Configuration in DFsetup

- All push notifications for **DFengage 2.5+** now defined in **ePRO Notifications** configuration in **DFsetup**
 - Only applies to mobile push notifications at this time (not used for email notifications currently)
- Changes tracked in config history
- Default generic notifications pre-populated for new & existing studies
 - **NOTE:** ePRO Notifications must be *manually saved* in DFsetup 5.11 to activate push notifications for DFengage 2.5

View ePRO Notifications

ID	Label	Visit	Timing	Translations	Status
1	Generic New Activity Reminder	All	-	1 lang	Inactive
2	Generic Overdue Activity Reminder	All	-	1 lang	Inactive
3	Day 1 due	Visit 11	8:00	1 lang	Active
4	Day 1 overdue 1	Visit 11	18:00	1 lang	Active
5	Day 1 overdue 2	Visit 11	21:00	1 lang	Active
6	Day 2 due	Visit 12	8:00	1 lang	Active
7	Day 2 overdue 1	Visit 12	18:00	1 lang	Active
8	Day 2 overdue 2	Visit 12	21:00	1 lang	Active
9	Day 3 due	Visit 13	8:00	1 lang	Active
10	Day 3 overdue 1	Visit 13	18:00	1 lang	Active
11	Day 3 overdue 2	Visit 13	21:00	1 lang	Active

Add Delete Duplicate

ID 11 Label Day 3 overdue 2 ☒ Active

Notification Type
Due - Sent at scheduled time

Visit Reference
Visit 13 - Day 3 Diary

Notification Timing
☒ Set Time ☐ Offset from Visit
21:00

Notification Content
English Clear

Title
Day 3 Diary overdue

Message
Don't forget to complete your Day 3 diary tonight.

History Revert Save Done

DFsetup: View > ePRO Notifications



ePRO Notification Definitions (1/2)

ID	Label	
1	Generic New Activity Reminder	☒ Active

Notification Type

Due - Sent at scheduled time

Visit Reference

All Visits

Notification Timing

☐ Set Time ☒ Offset from Visit

Days Hours Minutes Direction

0 0 0 After

Notification Content

default Clear

Title

New Activity

Message

It's time for your next activity. Please open the app to complete it now.

- **ID:** Auto-assigned in sequential order starting with 1
- **Label:** Short description
- **Active:** Notification status
- **Notification Type:**
 - **Due:** sent based on schedule date of referenced visit
 - **Overdue:** sent based on overdue date of referenced visit when activity is not completed
- **Visit Reference:** Select individual visit or all visits used to establish timing based on visit map
- **Notification Timing:** Define when notification is sent in relation to referenced visit due/overdue date & time:
 - **Set Time:** Define specific clock time (24-hour clock)
 - **Offset from Visit:** Define number of days, hours, and minutes before or after

ePRO Notification Definitions (2/2)

- **Notification Content:** Define title and message that appears in push notification on the user's device
 - Title: Maximum 65 characters
 - Message: Maximum 240 characters
 - Some devices may truncate longer titles
 - The title and message may include placeholders:
 - {{STUDY_NAME}}
 - {{PARTICIPANT_NAME}}
- **Translations:** Languages available in dropdown are defined in View > Translations
 - Filled green dot = title & message defined
 - Empty white dot = no title & message defined
 - DFengage sends notification based on study language selected during app setup

Notification Content Default-English Clear

Title

{{PARTICIPANT_NAME}}, a new survey is coming!

Message

A new survey for {{STUDY_NAME}} will be available in 5 minutes. We would greatly appreciate your feedback.

Notification Content English Clear

Title

Day 2 Diary

Message

Please complete your Day 2 Diary.

Spanish ☒

French ☐

German ☐

Default Generic ePRO Notifications

- Generic notifications pre-populated to replace previous default notifications sent in DFengage mobile
 - New Activity
 - Overdue Activity
- **Notifications must be activated by clicking Save** for new studies or existing studies upgraded from 5.10 or earlier
- Default notifications may be modified as needed per study
- If adding visit-specific notifications, make generic notifications inactive to avoid duplicate reminders

ID	Label	
1	Generic New Activity Reminder	☒ Active
Notification Type		
Due - Sent at scheduled time		v
Visit Reference		
All Visits		v
Notification Timing		
☐ Set Time ☒ Offset from Visit		
Days	Hours	Minutes
0	0	0
Direction		After v
Notification Content		
default		v Clear
Title		
New Activity		
Message		
It's time for your next activity. Please open the app to complete it now.		

ID	Label	
2	Generic Overdue Activity Reminder	☒ Active
Notification Type		
Overdue - Sent only if linked activity incomplete		v
Visit Reference		
All Visits		v
Notification Timing		
☐ Set Time ☒ Offset from Visit		
Days	Hours	Minutes
0	0	0
Direction		After v
Notification Content		
default		v Clear
Title		
Overdue Activity		
Message		
Oops, you missed your last activity. Let's get back on track now.		



DFsetup Config History

- All changes to ePRO Notifications definitions are tracked in history
- Available from File > View History > Config History or from **History** button in ePRO Notifications config dialog
- Similar to setup history for global settings, plates, modules, styles
- No other setup configurations tracked in history at this time

DFsetup - History for ePRO Notifications (last 30 days)

	Date and Time	Who	Change	ID	What Changed	Attribute	Old Value	New Value
102	2026-05-19 13:32:35	laura	add	8	Day 2 overdue 2	ID		before 10pm tonight.
103						Label		Day 2 overdue 2
104						Active		Yes
105						Type		due
106						Visit		Visit 12 - Day 2 Diary
107						Timing Type		setTime
108						Set Time		21:00
109						Offset Days		0
110						Offset Hours		2
111						Offset Minutes		0
112						Offset Direction		before
113						Language		English
114						English: Title		Day 2 Diary overdue
115						English: Message		Don't forget to complete your Day 2 diary tonight.
116	2026-05-19 13:32:58	laura	change	1	Generic New Activity Reminder	Active	Yes	No
117	2026-05-19 13:32:58	laura	change	2	Generic Overdue Activity Reminder	Active	Yes	No
118	2026-05-19 13:35:17	laura	add	9	Day 3 due	ID		9
119						Label		Day 3 due
120						Active		Yes
121						Type		due
122						Visit		Visit 13 - Day 3 Diary
123						Timing Type		setTime
124						Set Time		8:00
125						Offset Days		0
126						Offset Hours		2
127						Offset Minutes		0
128						Offset Direction		before
129						Language		English
130						English: Title		Day 3 Diary
131						English: Message		Please complete your Day 3 diary now for {{STUDY_NAME}}.
132	2026-05-19 13:35:30	laura	add	10	Day 3 overdue 1	ID		10
133						Label		Day 3 overdue 1
134						Active		Yes

History for

☒ ePRO notification

Limit to last

30

days

Refresh

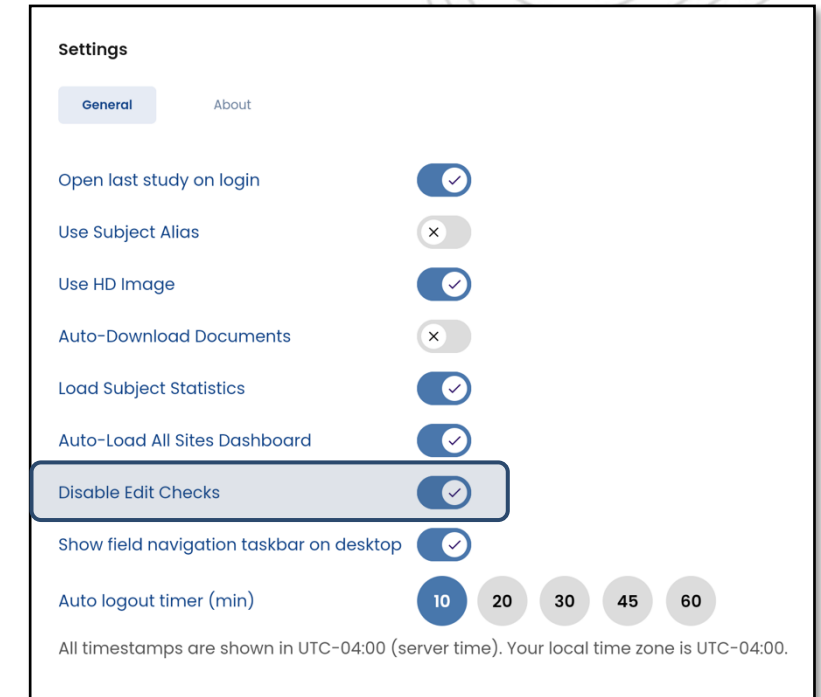
Save As...



DFweb Updates

DFweb Disable Edit Checks Setting

- New option on DFweb Settings page: **Disable Edit Checks**
- Only available to users with 'DFexplore – May disable edit checks' permission allowed in their role in DFadmin
- Setting is disabled by default & always disabled on study open
- Certain edit checks continue to run even when disabled: DFopen_study and DFopen_patient_binder
- **Note:** Task definitions also affect edit check execution
 - Edit checks will not run if task or setting disables them
 - Edit checks will run if task and setting allow them to run



DFweb: Settings > General

Requires DFdiscover server & API version 5.11 or later



DFweb Connection Issue Detection

- Some organizations implement strict firewall controls which may prevent users from accessing DFweb
- Warning message is displayed after login when connection issues are detected
- Typical solution is to allowlist/whitelist the DFdiscover API endpoint
 - API is dfws.dfdiscover.com in this example, but different DFweb instances may use different APIs
 - Warning message displays the actual API in use
- New section added to the DFweb User Guide: **DFweb Information for IT Teams**



Connection issue detected

Your network is blocking access to DFweb. This issue prevents you from using DFweb to access study data and perform other actions.



Network communication functioning



Cannot reach API dfws.dfdiscover.com

Required Action: Contact your IT department or network administrator with the details below to resolve this issue.

Please allow the following domain in your firewall or security settings:

- DFdiscover API endpoint: **https://dfws.dfdiscover.com**

[See more](#)



Copy details for IT support

Close

DFweb ePRO Access Links Update

DFweb: Updated ePRO Management Get Link or QR Code dialog

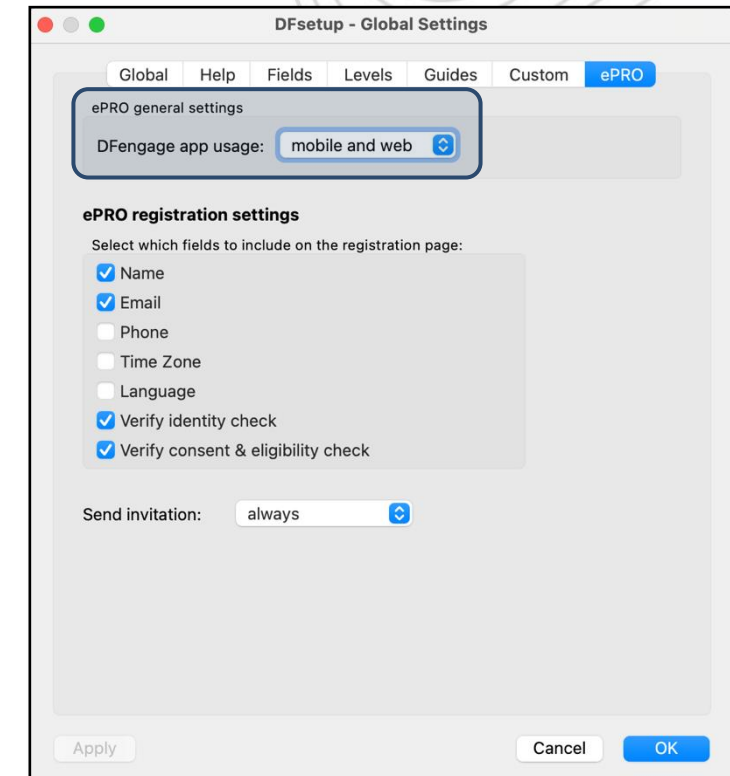
- Separate tabs for mobile & web if both enabled (default), or as defined in DFsetup global settings
- Web: uses 'dfengagefqdn' parameter in [DFedcservice.cf](#) set by system admin
- Mobile: uses dfengage.dfdiscover.com

DFsetup: New global setting for DFengage app usage

- Mobile & web, mobile only, or web only
- Controls which links are available in DFweb ePRO Management



DFweb: [ePRO](#) > [Subject] > [Get link / QR code](#)

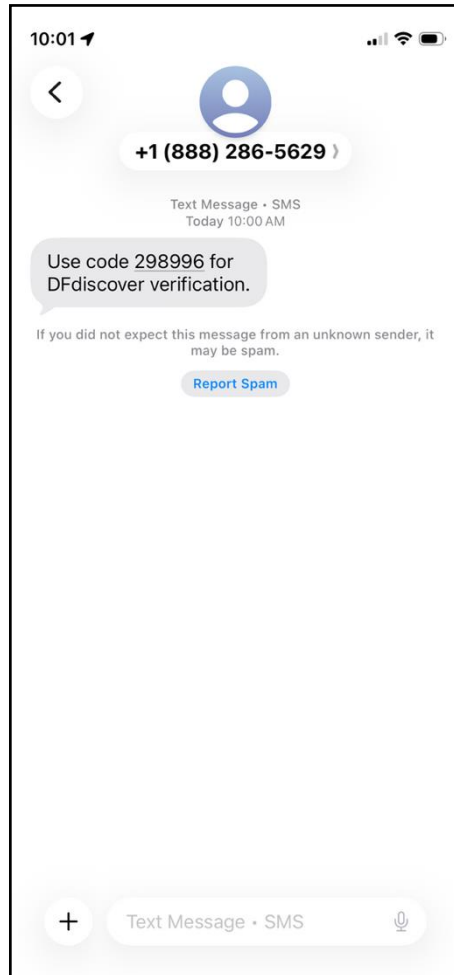


DFsetup: [Study](#) > [Global Settings](#) > [ePRO](#)



Optional, Region-Limited
SMS for 2FA

Optional, Region-Limited SMS for 2FA



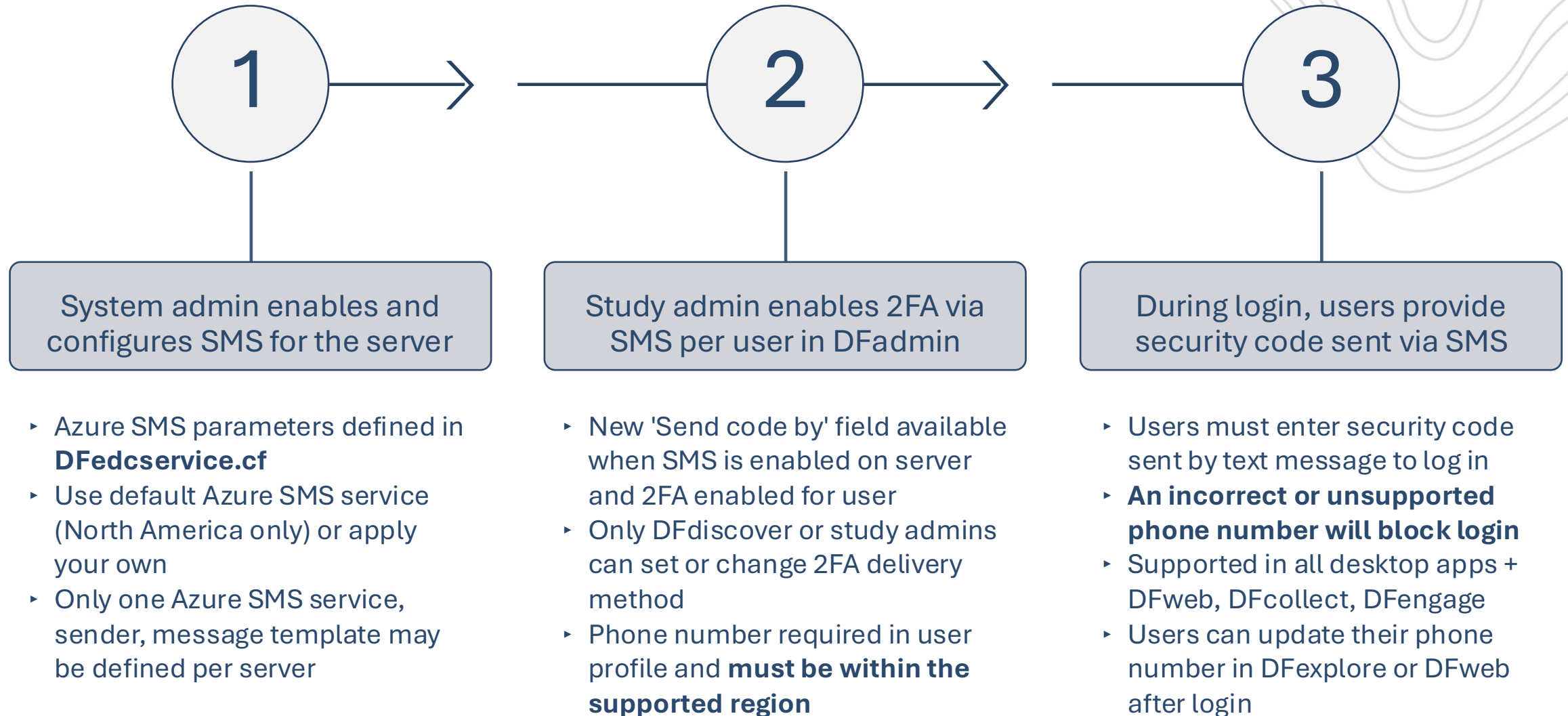
- DFdiscover supports **region-limited SMS** as a user-specific delivery option for two-factor authentication (2FA)
- Azure SMS service is enabled & configured per server by system administrator (disabled by default)
- Default configuration supports North American phone numbers only (USA, Puerto Rico, Canada)
- Enables 2FA via text message instead of email in supported region

Requires DFdiscover server & API version 5.11 or later

Need to know

- Disabled by default
- One Azure SMS service & sender (region) supported per server
- Phone numbers used for SMS must be within supported region
- Administrators control user-specific SMS delivery method in DFadmin
- SMS not available for communications other than 2FA

How to Use SMS for 2FA





DFadmin User Profile Update

- New field **Send code by** is available in **DFadmin Users > User Profile** when Azure SMS is enabled for the server
 - Field is disabled if Azure SMS is not enabled
- If **'Send code by Azure SMS'** is selected, phone number must be valid and **within the region supported** by Azure SMS configuration
 - Phone number must include both country code and area code, e.g. 1-555-1234567, for SMS delivery
 - System does not verify that the phone number is valid or within supported region

The screenshot shows the 'User Profile' tab for a user named 'demo'. The user's status is 'Active'. The form contains the following fields and options:

- Username:** demo
- Status:** Active (dropdown)
- New Password:** (input field)
- Tab Navigation:** User Profile (selected), Preferences, Permissions, ePRO Admin Permissions, History
- Full Name:** Demo Account
- Affiliation:** DFnet
- Address:** 4724 52nd Avenue South
- City:** Seattle
- State:** Washington
- Country:** USA
- Telephone:** 1-206-322-5931
- Fax:** (empty field)
- Email:** dfdiscover.demo@gmail.com
- Authentication Options:**
 - ☒ Two-factor authentication required
 - ☐ SSO Only
- Send code by:** email (selected with radio button), Azure SMS (disabled with a greyed-out radio button)



Additional Updates

Administration Updates

Restrict Server Connections in DFws API

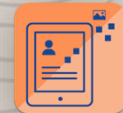
- New DFws API configuration to restrict which DFdiscover servers an API instance may connect to
- Attempts to connect to servers not authorized are rejected with error message 'Server name is not valid'
- **Why?** Improved security and control for self-hosted environments
- **How?** Define DFWS_AUTHORIZED_SERVERS parameter in dfws.cf

Nginx Reverse Proxy Deployment Support

- DFdiscover supports deployment behind NGINX reverse proxy for DFweb, DFengage web, and DFws
- Run all components under a single FQDN and port 443
- Available from DFdiscover 5.10.3 and DFengage 2.4.3 releases
- **Why?** Limit additional FQDNs required without using additional ports
- **How?** Check out the Nginx Configuration Guide for details

DFadmin Updates

- DFadmin Study Permissions Summary in Studies tab now includes ePRO Admin permissions
- Study administrators are now able to see user creation history for accounts they created



DFcollect Updates

- Updated device operating system requirements:
 - **Android devices** must be running **version 10** or later
 - **iPadOS/iOS devices** must be running **version 16** or later
- DFcollect is not recommended for use on smartphones, since smaller displays limit some interface elements and functionality
 - Recommended tablet size is 8.7” or larger
- Core application framework Qt has been upgraded to 6.8.6, improving long-term maintainability and enabling ongoing performance and compatibility enhancements

Additional Updates

eCRF display & printing



dfsetup



dfexplore

- Long choice and check labels on eCRFs now wrap to additional lines instead of only displaying first line
- Saving eCRFs to PDF has been improved so that content is not broken across pages
 - Content may still be split across pages when using background colors, since white space between lines is required to identify when to add page breaks
 - Resolves issue introduced in 5.10 with support for 1500 characters in field prompts & tables



BEFORE

☐ 0 - No redness, or less than 2.5 cm

☐ 1 - 2.5 - 5 cm

☐ 2 - 5.1 - 10 cm

☐ 3 - >10 cm

☐ 4 - Death of areas of skin or tissue (Necrosis) or redness, peeling or flaking of the skin (E...

Size:
 cm

AFTER

☐ 0 - No redness, or less than 2.5 cm

☐ 1 - 2.5 - 5 cm

☐ 2 - 5.1 - 10 cm

☐ 3 - >10 cm

☐ 4 - Death of areas of skin or tissue (Necrosis) or redness, peeling or flaking of the skin (Exfoliative Dermatitis)

Size:
 cm



Additional Updates

Subject Binder Page Label Improvement

- Page labels have been improved for repeating visits displayed in one folder in DFexplore
- Applies to page labels with field value substitution (%n or %n:d) defined in the DFsetup page map
- Previously, the original plate label was displayed until the page was opened
- **Note:** Only one field substitution per label is fully supported at this time
- If more than one substitution is included, values are displayed as expected only once the page is opened and all values are completed

BEFORE

▼		4001+ Adverse Event
		4001: 400: AE 01 TIA (04/OCT/2023)
		4002: 400: Adverse Event
		4003: 400: Adverse Event
	☐	4004: 400: Adverse Event

AFTER

▼		4001+ Adverse Event
		4001: 400: AE 01 TIA (04/OCT/2023)
		4002: 400: AE 02 Headache ()
		4003: 400: AE 03 Bruise ()
	☐	4004: 400: AE 04 ()

Additional Updates

- **PDF Processing Improvements:** PDF and image conversion for document attachments & paper CRFs has been improved
 - Resolves issues where certain PDFs (e.g., generated by Microsoft Print to PDF) were not processed correctly or were not received
 - High definition imaging must be enabled on the server to take full advantage
 - Standard definition PDFs and images processed by server continue to use previous implementation to maintain ICR behavior for image-based CRFs
- **Framework Upgrade:** DFdiscover's core application framework (Qt) has been upgraded, improving long-term maintainability and enabling ongoing performance and compatibility enhancements
 - As part of this update, some user interface elements may appear slightly different, including controls such as checkboxes and buttons

DFdiscover 2026 Upgrade Need-to-Know



DFengage mobile notifications change

Go to View > ePRO Notifications in DFsetup and save the configuration to continue delivery of DFengage reminders via push notification



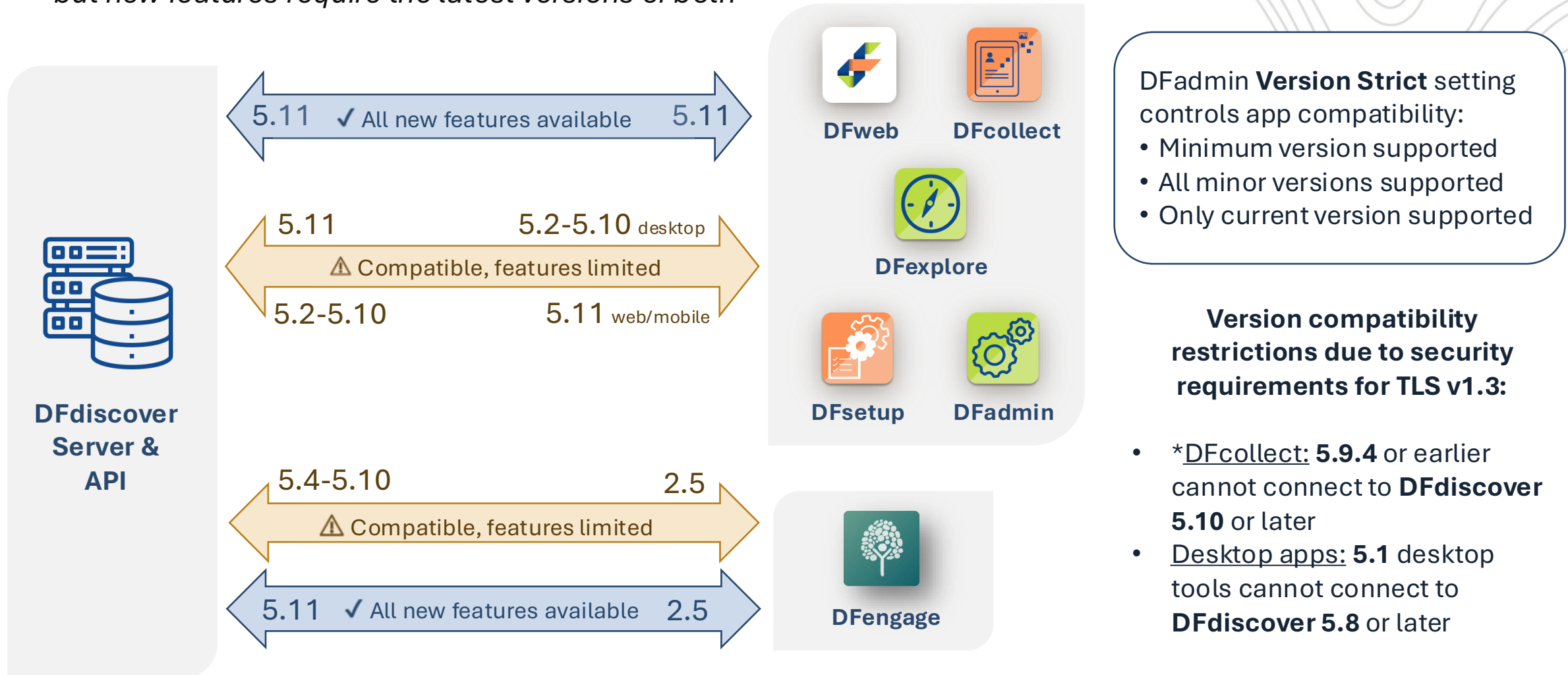
DFcollect device requirement update

DFcollect users are now required to be on **Android 10 or later** or **iPadOS/iOS 16 or later** to use DFcollect 5.11



Version Compatibility

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



Learn More

DFdiscover 5.11

Release Notes: Details of all updates since 5.10, 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

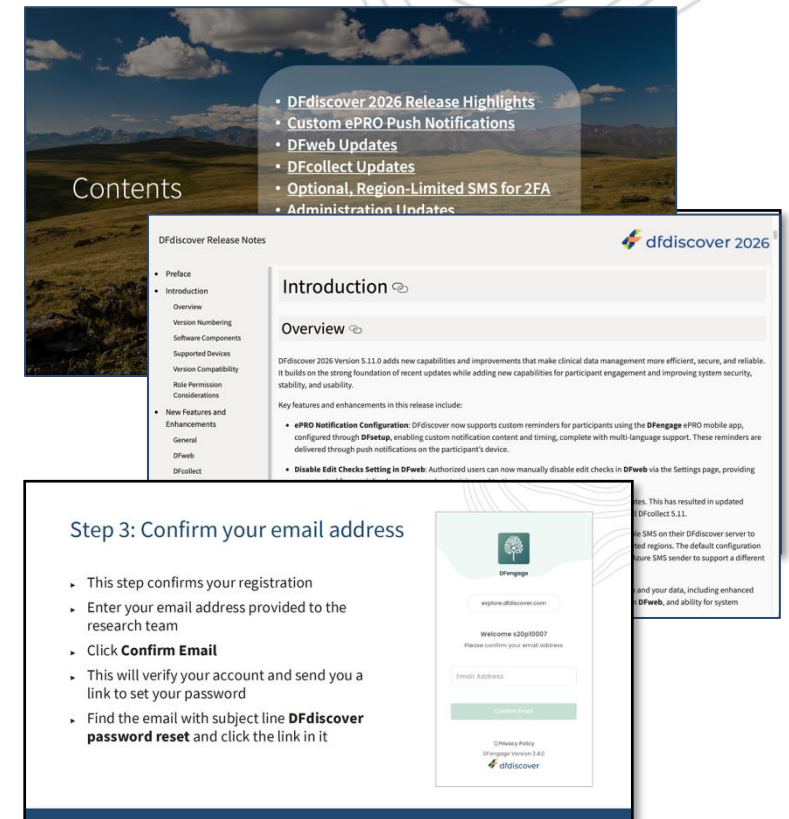
DFengage 2.5

Release Notes: Details of changes since DFengage 2.4

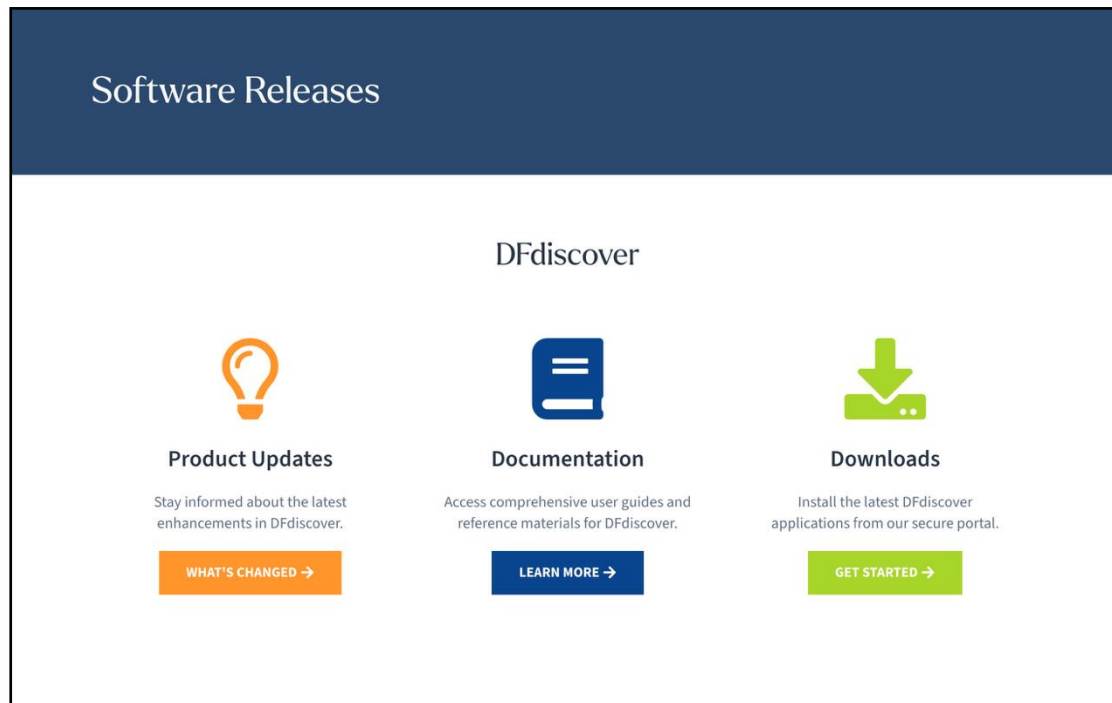
Training Slides: Comprehensive deep-dive on using & implementing DFengage

User Guide: Details for end users of DFengage

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



Software Releases Website



Find DFdiscover downloads, documentation, and updates on the DFnet website

- **Software Releases** page (*account required*)
- **What's New** page (*no account required*)

Product Updates: latest releases & patches

Documentation: user guides & release notes (*account required for API documentation*)

Downloads: installers for desktop apps and servers (*account required for server installers*)

DFnet Academy: training videos for DFexplore (*account required*)



What's Next

Next Up ...

- **Study branding in DFengage:** Display study or organization logo
- **Subject binder enhancement:** Repeating visits in one folder in DFweb
- **Email reminders:** Send custom ePRO notifications via email
- **SMS expansion:** Support multiple SMS regions per server
- **Setup enhancement:** Expand setup import from Excel/JSON in DFsetup
- **Embedded images:** Improved inline images in eCRFs and ePRO, online & offline

Questions?



Software Support

help@dfnetresearch.com



How Else Can We Support You?

Have an upcoming study?
Need additional data support?
Let's talk.

info@dfnetresearch.com



What's New?

Stay updated on what's new
at DFnet, upcoming events
and more.

Follow us on LinkedIn or
visit dfnetresearch.com



Webinar Recording

The link to the webinar
recording will be shared
with you via email.



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

