

# Castor ePRO Site Guidelines: Activating ePRO BEST Diary for Participants

- \* Remind participants that the security of their mobile/tablet devices is their own responsibility.
- \* Please advise the participant that should any issues arise with the use of ePRO Castor Connect app, they should get in touch with the research team at site. Please inform the Data Management Team as soon as possible ([air-net-dm@dundee.ac.uk](mailto:air-net-dm@dundee.ac.uk)).
- \* Upon completion of the trial, the Castor Connect app can be deleted from their mobile/tablet devices.

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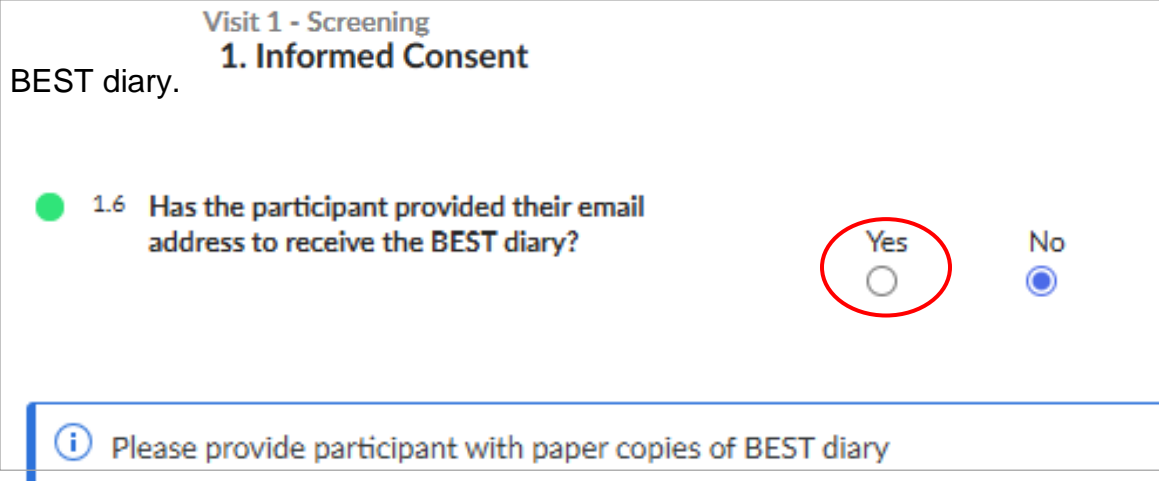
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## 1. Recording BEST diary participant choice on Castor

This guide is for activating the ePRO (electronic patient reported outcomes) BEST diaries on the eCRF Castor for the AIR-NET trial. The diaries set up on Castor are called “surveys”. The survey notifications need to be activated by the research team at site. This must be performed **on the date of visit 2**, if the participant is eligible for trial and is randomised. You should give the participant the choice to complete their BEST diary electronically (either via the Castor Connect app or by an email link), or on paper. This choice must be recorded on Castor when entering visit 1 data, under the “Informed Consent” tab.

### Paper diary completion

If the participant chooses to complete their BEST diary on paper, the following question must be answered “no”. Please ensure the participant is provided with paper copies of the daily diary, and ask them to bring their completed diaries to each visit (visits 3, 4 and 5)



Visit 1 - Screening  
1. Informed Consent

BEST diary.

1.6 Has the participant provided their email address to receive the BEST diary?

Yes  No

*Note: The 'Yes' radio button is circled in red in the original image.*

*Note: The 'No' radio button is selected (filled blue).*

**i** Please provide participant with paper copies of BEST diary

You will collect the completed copies of the daily BEST diaries at each visit, and these will be transcribed into Castor by the site research team.

To enter the daily BEST diary in Castor:

- Click on the participant ID
- On the left side of the Castor webpage, click on “**Repeating data**”
- At the top right of the Castor webpage, click on “**Create**”
- From the dropdown list, select “**BEST diary**”

Enter the data on Castor as shown on the paper diary

You do not need to follow any further instructions within this guide.

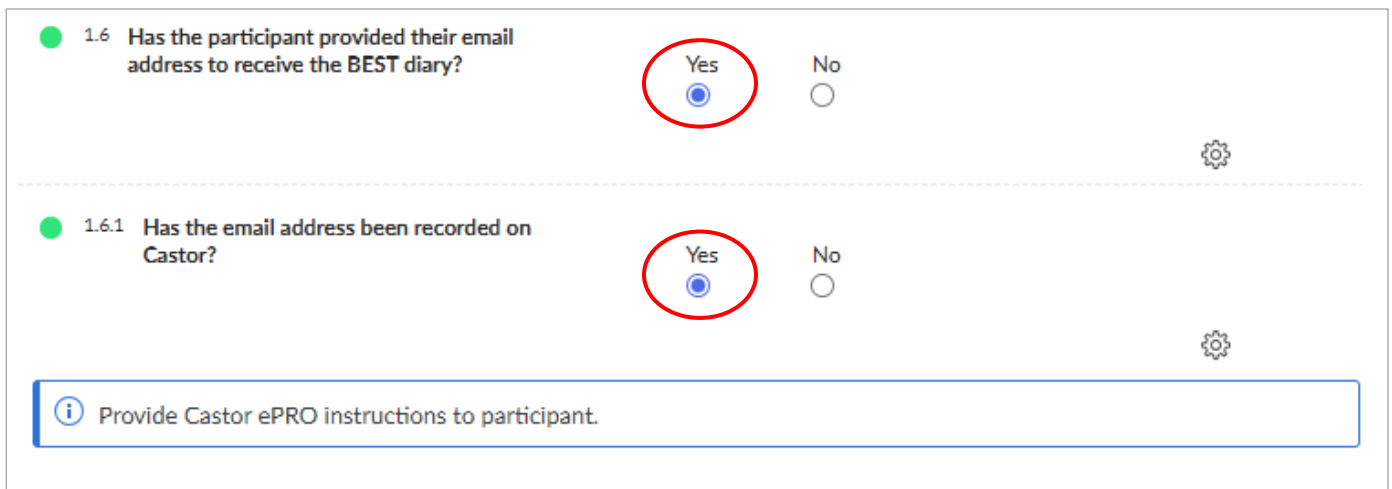
### **Electronic diary completion**

If the participant agrees to complete their BEST diary electronically, you must collect their email address and add this to Castor. This can be done when you create the participant ID, or you can add the email address after the participant ID has been created. **Their email address must be on Castor by visit 2**, in order to activate the BEST diary at the start of the trial.

Participants completing the electronic BEST diary will receive an app notification or an email link daily for 28 days from visit 2.

Please ensure the participant receives the *AIR-NET Castor ePRO Guidelines for Participants* for instructions on how to set up the Castor app or the email notifications.

If the participant chooses to complete their BEST diary electronically, the following questions must be answered “yes” on Castor Visit 1 - Screening, Informed Consent:



The screenshot shows two questions in a Castor ePRO interface. The first question is "1.6 Has the participant provided their email address to receive the BEST diary?". The "Yes" radio button is selected and circled in red. The second question is "1.6.1 Has the email address been recorded on Castor?". The "Yes" radio button is also selected and circled in red. Both questions have a gear icon for settings to their right. Below the questions is a blue-bordered box containing an information icon and the text "Provide Castor ePRO instructions to participant."

1.6 Has the participant provided their email address to receive the BEST diary?  Yes  No

1.6.1 Has the email address been recorded on Castor?  Yes  No


*Provide Castor ePRO instructions to participant.*

## 2. Adding participant email address to Castor

A participant needs to have an email address added to Castor prior to setting up the surveys:

### Adding a participant email when creating a new participant

Open Castor to view the AIR-NET participant overview page.

- To add a new participant on Castor EDC, click 
- The site will be pre-populated
- Enter the participant ID (in the correct format of site number and participant number e.g. 01001)
- Add the participant email
- Click "Create"

### Adding a participant email after a participant has been created

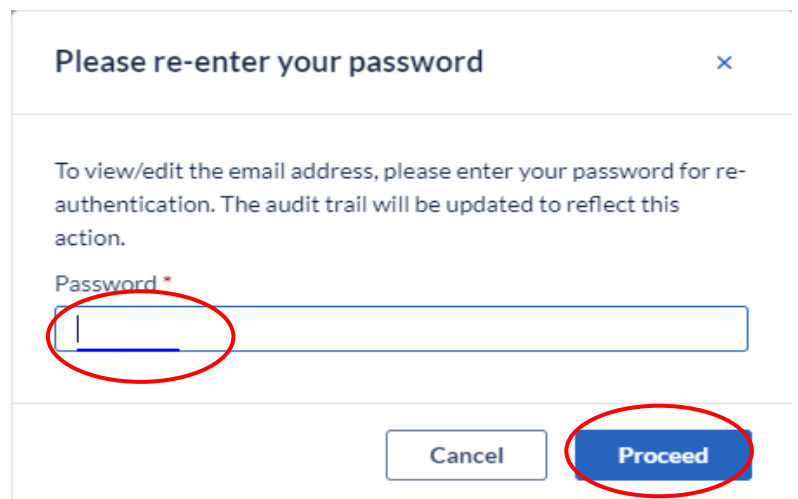
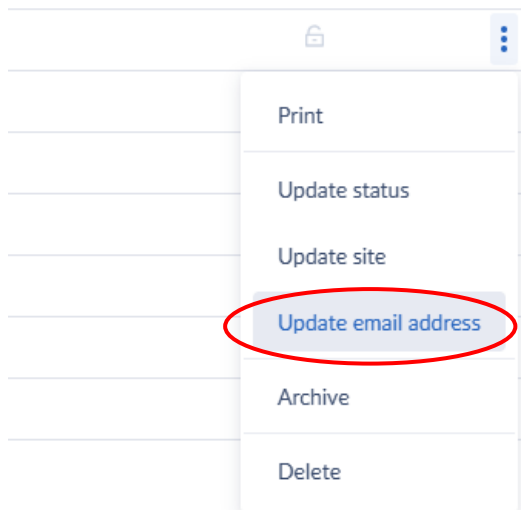
The participants email address can also be added after the creation of their ID on Castor.

Go to the Castor "Participants" homepage

Click on the three vertical dots to the far right of the participant ID

Select **Update email address**:

You will need to enter your Castor password and click **Proceed**:



Enter the email address of the participant and the reason for change in the appropriate boxes then select **Change participant email**:

Add email address to participant: 01002  

Email \*

Reason for change \*

Cancel

Change participant email

Please ensure the participant receives the *AIR-NET Castor ePRO Guidelines for Participants* for instructions on how to set up the Castor app or the email notifications.

### 3. Castor Surveys

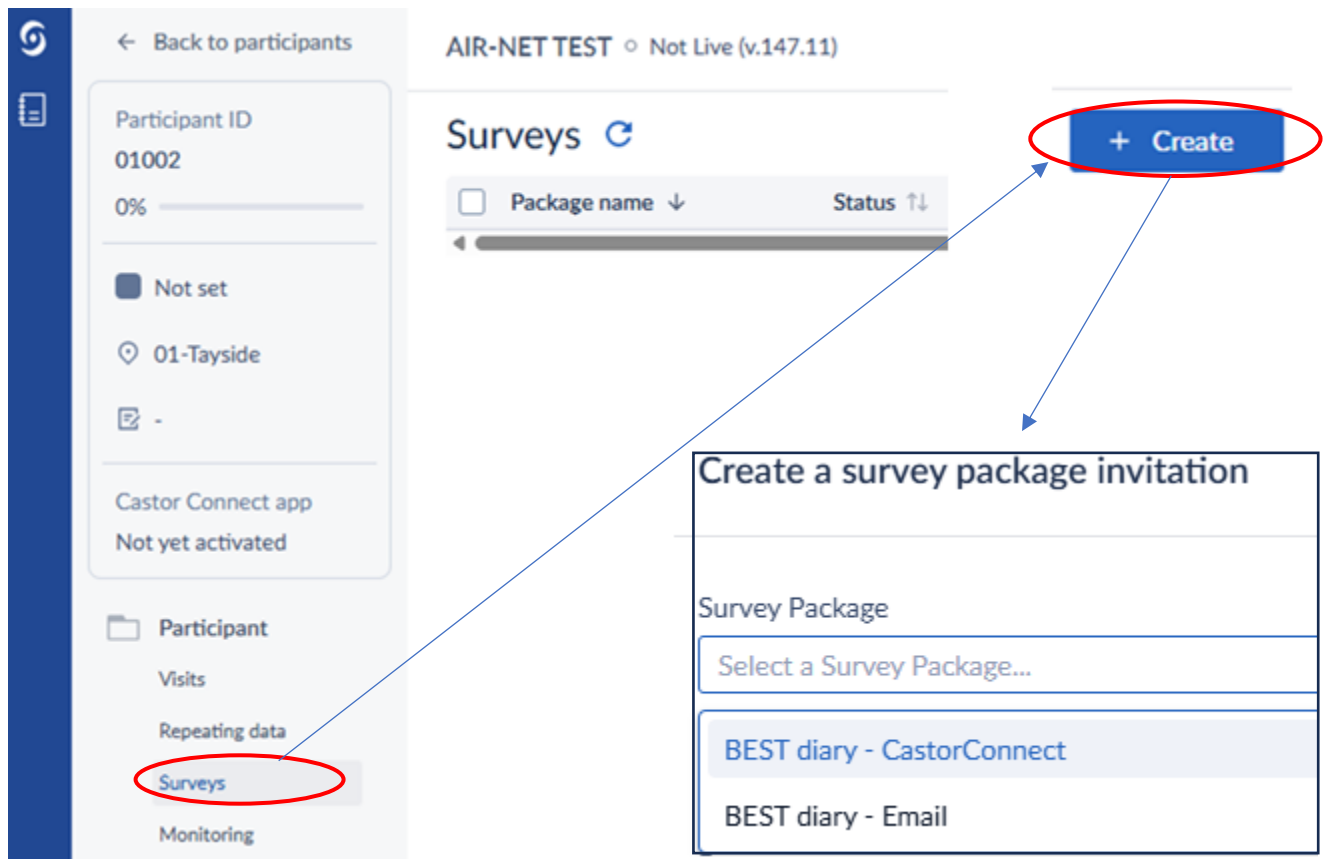
There is **1 survey** that **must be set up on Castor during visit 2:**

#### 1. BEST diary

To activate the surveys for a specific participant, go to the Castor “Participants” homepage  
Click on the participant you would like to activate

On the left side of the page, click **Surveys**

Then at the top right of the survey page, click **Create**



The screenshot shows the Castor interface for a participant named 'AIR-NET TEST' (v.147.11). On the left sidebar, the 'Surveys' option is circled in red. In the main content area, the '+ Create' button is also circled in red. A modal window titled 'Create a survey package invitation' is open, showing a dropdown menu with 'BEST diary - CastorConnect' selected.

“Create a survey package invitation” will open:

The “survey package” selected from the dropdown list will depend on whether the participant would like to receive the BEST diary via Castor app or email.  
Instructions for both options are detailed below.

### Castor Connect App surveys

If the participant has chosen to complete the BEST diary through the Castor Connect App, the following question will be answered “yes” in Castor at visit 1, Inclusion criteria.

The survey must be activated on the date of randomisation (visit 2).

● 1.6.2 Would the participant prefer to install and use the CastorConnect mobile App to receive the BEST diary?

Yes  No

### Email surveys

If the participant has chosen to complete the BEST diary through emails, the following question will be answered “no” in Castor at visit 1, Inclusion criteria.

The survey must be activated on the date of randomisation (visit 2).

● 1.6.2 Would the participant prefer to install and use the CastorConnect mobile App to receive the BEST diary?

Yes  No

## 4. Activating daily survey for App

Click on the participant you would like to activate

On the left side of the pack, click **Surveys** → **+ Create**

“Create a survey package invitation” will open

Select the survey package named **BEST diary – Castor Connect**

Leave the Parent field as “None”

Do not edit the invitation message

Scroll down to the bottom and under ‘**Available from**’ select **TODAY’S DATE** and the time of **16:00**

Under “Schedule repeated surveys” select: **Daily** from the drop-down list

Click **Create** and a list of scheduled surveys will appear.

## Create a survey package invitation



Survey Package

BEST diary - CastorConnect

Email

[Using provided email address. Click to view or edit.](#)

Parent

None

Subject

Invitation from {studyName} to register in Castor Connect

Invitation message  [Formatting cheatsheet](#)

Dear Study Participant,

You have been invited by your study administrator to fill in survey(s) in the Castor Connect mobile app. You will need to download the app from the relevant app store before proceeding to use the app:

{castorconnect-apple-store-link} {castorconnect-google-store-link}

Preview

Available from

19.11.2025



16:00



(GMT)

Schedule repeated surveys

Daily (1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,22,23,...)

[Manage](#)

Cancel

Create

## 5. Activating daily survey for email

- Click on the participant you would like to activate
- On the left side of the pack, click **Surveys** then click **+ Create**
- “Create a survey package invitation” will open
- Select the survey package named **BEST diary – Email**
- Leave the Parent field as “None”
- Do not edit the invitation message
- Lock survey if finished should be selected
- Scroll down to the bottom and select “on a specific date or schedule”
- Select **TODAY’S DATE** and the time of **16:00**
- Under “Schedule repeated surveys” select: **Daily** from the drop-down list
- Click **Create** and a list of scheduled surveys will appear.

Participants should follow the instructions in the *AIR-NET Castor ePRO Guidelines for Participants*

\*Please note – the initial survey invitation commonly appears in the participant’s junk/spam box so they will need to ensure they check there\*

## Create a survey package invitation



Survey Package

BEST diary - Email

Email

[Using provided email address. Click to view or edit.](#)

Parent

None

Subject

Complete BEST diary

Invitation message  [Formatting cheatsheet](#)

Dear participant,

Thank you for taking part in the AIR-NET trial.

Please click the link below to complete your BEST diary.

{url}

Preview

Lock survey if finished 

Send on date / schedule

Now  Decide later  On a specific date or schedule

Planned send date

19.11.2025



Schedule repeated surveys

Daily (1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,22,23,...



[Manage](#)

Cancel

Create

## 6. Monitoring BEST diary completion

After the surveys have been initiated, it is important to check that the participant has successful access and is completing their surveys. Please ask the participant if they are having any issues with access or completion.

To review the survey completion rate, click on the participant ID, go into “Surveys” on the left-hand side of the page. This will show a list of the surveys. Click on “**Available from**” to list the surveys in date order. The “Sent on” date “Completed on” date should match.

### Surveys

<input type="checkbox"/>	Package name ↑↓	Stat... ↑↓	Parent	Progress ↑↓	Created on ↑↓	Available from ↓	Sent on ⌚ ↑↓	Completed on ↑↓
<input type="checkbox"/>	BEST diary - Email	Sent		<div style="width: 100%;"></div>	16 May 2025	18 May 2025	18 May 2025 04:01	
<input type="checkbox"/>	BEST diary - Email	Locked		<div style="width: 100%; background-color: green;"></div>	16 May 2025	19 May 2025	19 May 2025 04:01	23 May 2025
<input type="checkbox"/>	BEST diary - Email	Sent		<div style="width: 100%;"></div>	16 May 2025	20 May 2025	20 May 2025 04:01	
<input type="checkbox"/>	BEST diary - Email	Sent		<div style="width: 100%;"></div>	16 May 2025	21 May 2025	21 May 2025 04:01	

## 7. Resetting a participant’s pin

The participant may select **Forgot PIN** in their Castor Connect app when prompted for their security pin. This will then send an email to the Data Management Team.

## 8. Resending a survey invitation to a participant

Firstly, check with the participant that the invitation doesn’t appear in the junk/spam folder.

To resend a survey invitation, open the participant ID on Castor → go to **Surveys**

Find the survey and then click on the three vertical dots to the far right, select **(Re)send invite**

→ **Send invitation**