

Castor ePRO Site Guide: Activating ePRO Symptom Diary for Participants

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1. Recording symptom diary participant choice on Castor

This guide is for activating the ePRO (electronic patient reported outcomes) daily & monthly symptom diaries on the eCRF Castor for the ESCAPE trial. The diaries are set up on Castor called “surveys”. The survey notifications need to be activated by the research team. 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 symptom diary electronically (either via the Castor Connect app or by an email link), or on paper. This choice must be recorded on Castor during visit 2, under the “Symptom Diary Setup” tab.

Paper diary completion

If the participant chooses to complete their symptom diary on paper, the following question must be answered “no”. Please ensure the participant is provided with paper copies of the weekly symptom diary, with enough copies to complete until their next visit.

Visit 2 - Randomisation

20. Symptom diary setup

✓ 20.1 Has the participant provided their email address to receive the daily symptom diary? *

Yes No

Please provide participant with paper copies of the symptom diary

New

Collect the completed copies of the weekly paper symptom diaries at each visit and provide the participant with a new paper diary pack to complete until their following visit. Paper symptom diaries will be transcribed into Castor by the site research team. To enter the weekly symptom diary on 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 “**ESCAPE paper symptom 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 symptom 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 symptom diary at the start of the trial. Participants completing the electronic symptom diary will receive an app notification or an email link daily for the duration of the trial (from visit 2 – end of trial).

Please ensure the participant receives the *ESCAPE Castor ePRO Participant Guide* for instructions on how to set up the Castor app or the email notifications.

If the participant chooses to complete their symptom diary electronically, the following questions must be answered “yes” on Castor visit 2 under “Symptom diary setup” tab:

Visit 2 - Randomisation

20. Symptom diary setup

✓ 20.1 Has the participant provided their email address to receive the daily symptom diary? * ⋮

Yes No

✓ 20.1.1 Has the email address been recorded in Castor? * ⋮

Yes No

ⓘ Please provide the ESCAPE ePRO Participant Guide to the participant.

New

2. Adding participant email address to Castor

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

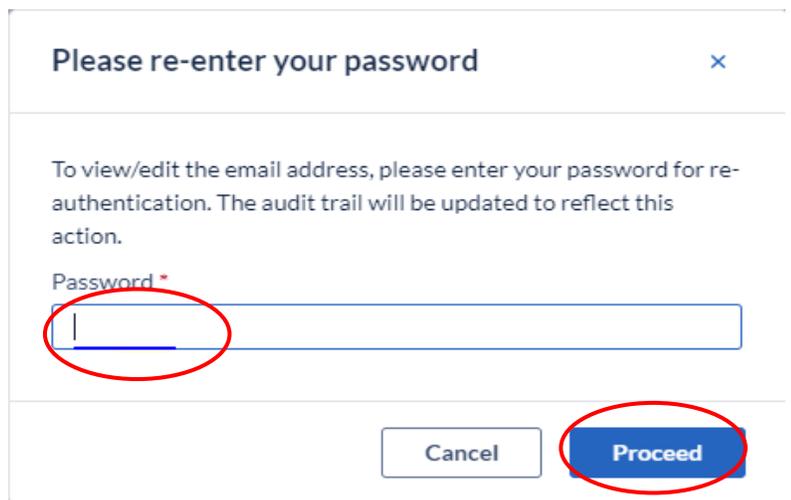
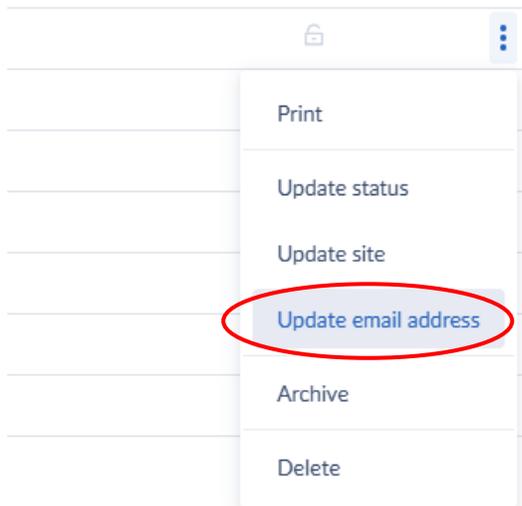
Adding a participant email when creating a new participant

Open Castor to view the ESCAPE 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. 0101)
- 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**:

Update email address for participant: 0102 ◇ ×

Email *

Reason for change *

Notice

You have survey invites for this participant. All missing and original email addresses will be updated with the new one.

Would you also like to update invite email addresses which do not match the original participant email address?

Update email addresses

Yes No

Cancel

Change participant email

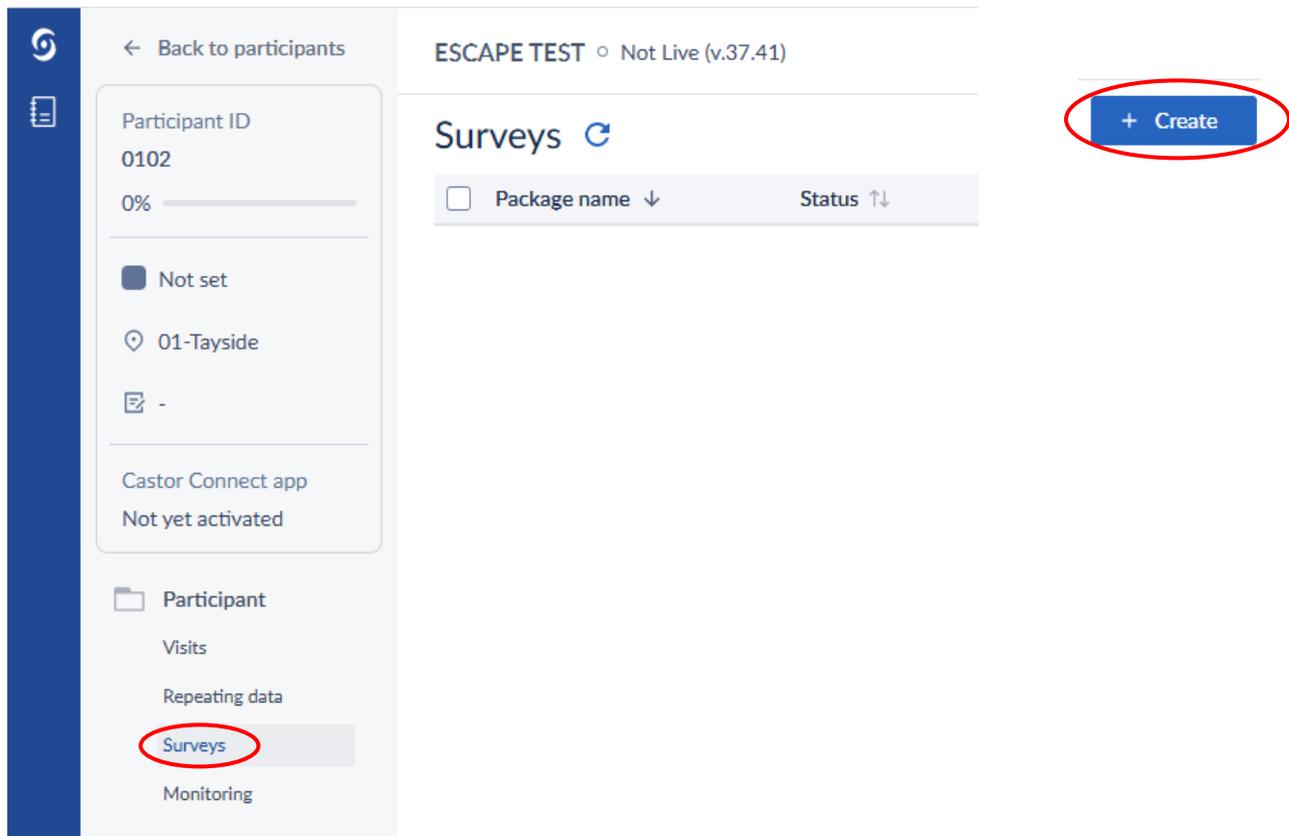
Please ensure the participant receives the *ESCAPE Castor ePRO Participant Guide* for instructions on how to set up the Castor app or the email notifications.

3. Castor Surveys

There are **2 surveys** that **must be set up on Castor during visit 2:**

1. **ESCAPE daily symptom diary**
2. **ESCAPE monthly question**

- 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 'ESCAPE TEST' (v.37.41). On the left sidebar, the 'Surveys' menu item is highlighted and circled in red. In the main content area, the 'Surveys' page is displayed with a '+ Create' button circled in red in the top right corner. The page also shows a dropdown menu for 'Package name' and a 'Status' filter.

“**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 symptom 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 symptom diary through the Castor Connect App, the following question will be answered “yes” in Castor at visit 2, under “Symptom diary setup”. The survey must be activated on the date of randomisation (visit 2).

20.1.2 **Would the participant prefer to install and use the Castor Connect mobile App to receive the daily symptom diary? *** ⋮

Yes No

i Please set up the Castor Connect ESCAPE daily symptom diary & ESCAPE monthly question surveys as per ESCAPE Castor ePRO Site Guide

New

Email surveys

If the participant has chosen to complete the symptom diary through emails, the following question will be answered “no” in Castor at visit 2, under “Symptom diary setup”. The survey must be activated on the date of randomisation (visit 2).

20.1.2 **Would the participant prefer to install and use the Castor Connect mobile App to receive the daily symptom diary? *** ⋮

Yes No

i Please set up the web-based ESCAPE daily symptom diary & ESCAPE monthly question surveys as per ESCAPE Castor ePRO Site Guide

New

4. Activating daily survey for App

- Click on the participant you would like to activate
- On the left side of the pack, click **Surveys** and **+ Create**
- “Create a survey package invitation” will open
- Select the survey package named **ESCAPE daily symptom 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: **2 years DAILY** from the drop-down list
- Click **Create**.

A list of scheduled surveys will be created in the background (this may take a few minutes). Click on the ‘x’ button to close the “Create a survey package invitation” pop-up page.

- After a few minutes, refresh **Surveys** and a list of scheduled surveys will be displayed for this participant.
- Provide the *ESCAPE Castor ePRO Participant Guide* to the participant

Create a survey package invitation



Survey Package

ESCAPE Daily symptom diary - Castor Connect

Email

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

Parent

None

Subject

Invitation from ESCAPE to register in Castor Connect

Invitation message [Formatting cheatsheet](#)

Dear participant,

Thank you for choosing to take part in the ESCAPE trial and completing your daily symptom diary in the Castor Connect app.

You will need to download the app from the relevant app store before proceeding to use the app:

Preview

Available from

11.11.2025



16:00



(GMT)

Schedule repeated surveys

2 years DAILY (0,1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,2...



[Manage](#)

Cancel

Create

5. Activating monthly survey for App

- Now you need to set up the monthly question survey
- Repeat the steps above to open “Create a survey package invitation”
- Select the survey package named **ESCAPE monthly question – Castor connect**
- Scroll down to the bottom and under ‘**Available from**’ select **TODAY’S DATE** and the time of **16:00**
- Under “Schedule repeated surveys” select: **2 years MONTHLY** from the drop-down list
- Click **Create**

A list of scheduled surveys will be created in the background (this may take a few minutes). Click on the ‘x’ button to close the “Create a survey package invitation” pop-up page.

- After a few minutes, refresh **Surveys** and a list of scheduled surveys will be displayed for this participant.

Available from

11.11.2025  16:00  (GMT)

Schedule repeated surveys

2 years MONTHLY (0,30,60,90,120,150,180,210,240,270,300,330,36...  [Manage](#)

Cancel

Create

Following activation of the surveys, the participant will receive an email invite to download the Castor Connect App and they should follow the instructions in the *ESCAPE Castor ePRO Participant Guide*.

Please note – the initial survey invitation commonly appears in the participant’s junk/spam box so please ensure they check there.

6. 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 **ESCAPE daily symptom diary – Web-based**
- 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: **2 years DAILY** from the drop-down list
- Click **Create**.

A list of scheduled surveys will be created in the background (this may take a few minutes). Click on the ‘x’ button to close the “Create a survey package invitation” pop-up page.

- After a few minutes, refresh **Surveys** and a list of scheduled surveys will be displayed for this participant.
- Provide the *ESCAPE Castor ePRO Participant Guide* to the participant

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

ESCAPE Daily symptom diary - Web-based

Email

Parent

None

Subject

Daily symptom diary for ESCAPE trial

Invitation message [Formatting cheatsheet](#)

Dear participant,

Thank you for taking part in the ESCAPE trial. Please click the link below to complete your daily symptom diary:
{url}

Preview

Lock survey if finished 

Send on date / schedule

Now Decide later On a specific date or schedule

Planned send date

11.11.2025



Schedule repeated surveys

2 years DAILY (0,1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20... 

[Manage](#)

Cancel

Create

7. Activating monthly survey for email

- Now you need to set up the monthly question survey.
- Repeat the steps above to open “Create a survey package invitation”
- Select the survey package named **ESCAPE monthly question – Web-based**
- Scroll down to the bottom and under ‘**Available from**’ select **TODAY’S DATE** and the time of **16:00**

Lock survey if finished ⓘ

Send on date / schedule

Now Decide later On a specific date or schedule

Planned send date

11.11.2025 

Schedule repeated surveys

2 years MONTHLY (0,30,60,90,120,150,180,210,240,270,300,330,... 

[Manage](#)

Cancel

Create

Click **Create**.

A list of scheduled surveys will be created in the background (this may take a few minutes). Click on the ‘x’ button to close the “Create a survey package invitation” pop-up page.

After a few minutes, refresh **Surveys** and a list of scheduled surveys will be displayed for this participant.

Following activation of the surveys, the participant will receive an email invite to complete the symptom diary. They should follow the instructions in the *ESCAPE Castor ePRO Participant Guide*.

Please note – the initial survey invitation commonly appears in the participant’s junk/spam box so please ensure they check there

8. Monitoring symptom diary completion

After the surveys have been initiated, you can check whether the participant has successful access and is completing their surveys. Please ask the participant at visit 3 & visit 4 whether they are having any issues with access or completion of the surveys on the app or via email.

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 ↑↓	Status ↑↓	Parent	Progress ↑↓	Created on ↑↓	Available from ↓	Sent on  ↑↓	Completed on ↑↓
<input type="checkbox"/>	ESCAPE Daily symptom diary -	Completed		<div style="width: 100%; height: 10px; background-color: green;"></div>	18 Nov 2025	18 Nov 2025	18 Nov 2025 10:28	18 Nov 2025
<input type="checkbox"/>	ESCAPE Daily symptom diary -	Created		<div style="width: 0%; height: 10px; background-color: gray;"></div>	18 Nov 2025	19 Nov 2025		
<input type="checkbox"/>	ESCAPE Daily symptom diary -	Created		<div style="width: 0%; height: 10px; background-color: gray;"></div>	18 Nov 2025	20 Nov 2025		
<input type="checkbox"/>	ESCAPE Daily symptom diary -	Created		<div style="width: 0%; height: 10px; background-color: gray;"></div>	18 Nov 2025	21 Nov 2025		

9. 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.

10. 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 and go to **Surveys**.

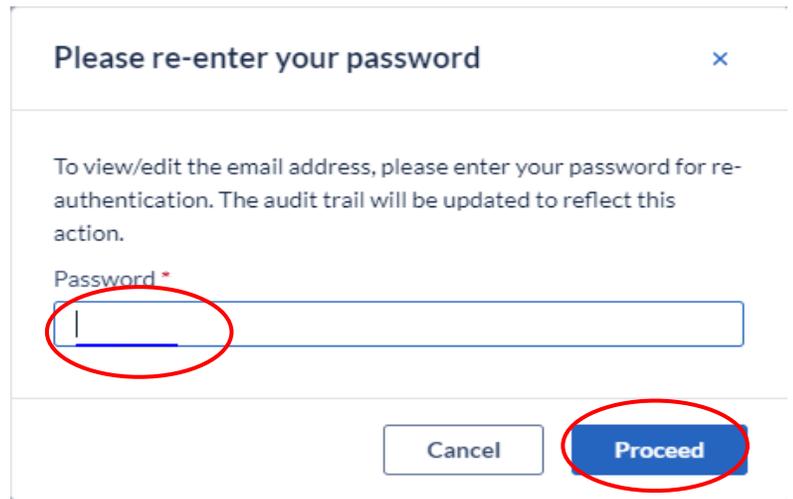
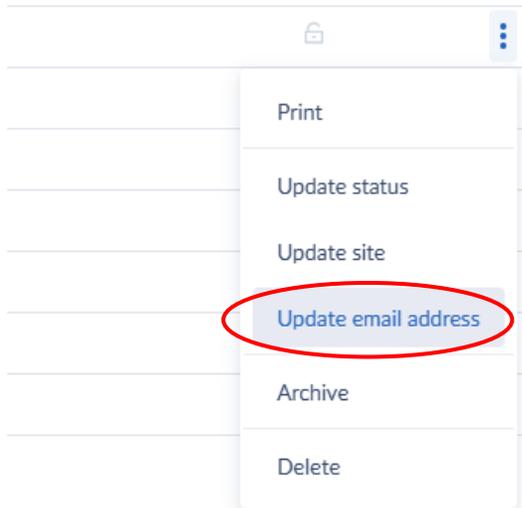
Find the survey and then click on the three vertical dots to the far right, select **(Re)send invite** > **Send invitation**.

11. Stopping survey notifications

Participants who leave the trial will still receive their scheduled surveys until this is deactivated on Castor or until the App is disabled. If a participant leaves the trial or would like to stop receiving notifications, please follow the steps below.

Stopping email notifications: please change the participant's email address to the following: surveys-dm@dundee.ac.uk. This can be done using the following steps:

- Go to the Castor "Participants" homepage
- Click on the three vertical dots to the far right of the participant ID
- Select **Update email address:** and enter surveys-dm@dundee.ac.uk.
- You will need to enter your Castor password and click **Proceed:**



- All future email surveys will now be sent to this alternative email (surveys-dm@dundee.ac.uk) rather than to the participant.

Stopping Castor App notifications: notify the participant that they should delete the App on their mobile or tablet device to stop all future notifications.