



# CRStar Client Portal

## Instructions

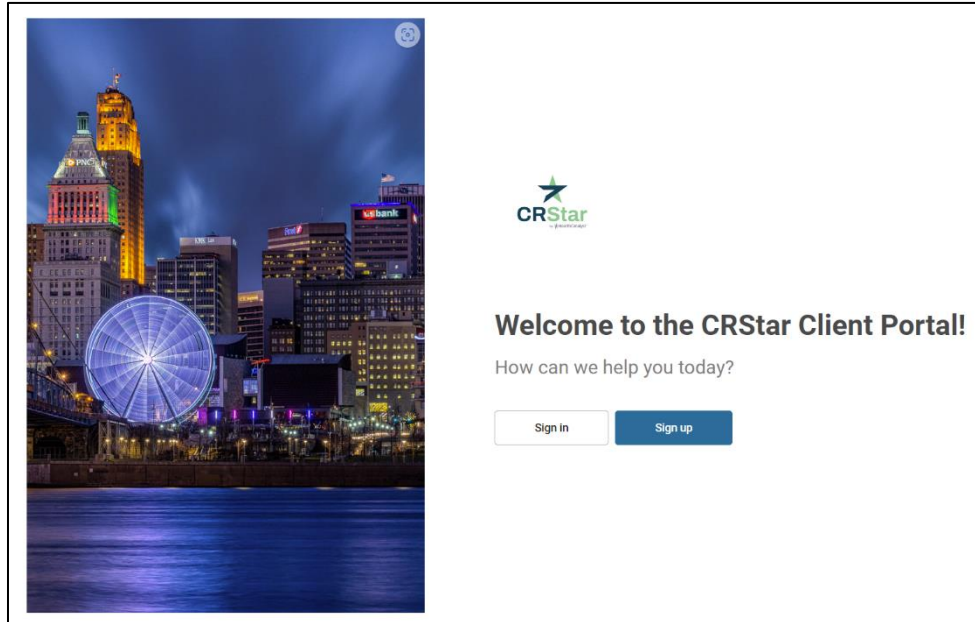
The CRStar Client Portal is designed to make ticket submission quick and easy, and to help provide the information needed to make sure your ticket gets assigned to the appropriate staff as quickly as possible. The portal serves as a ticket management system, and for administrative level users, a user management system. The CRStar Resource Page (containing Insights, Enhancements, Training Videos and more) is available from within CRStar.

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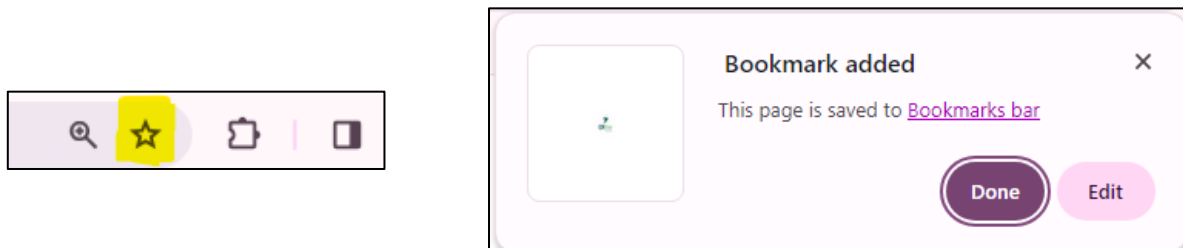
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## Bookmark the Portal

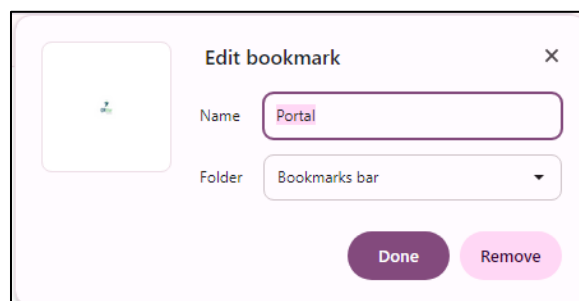
Link to the CRStar Client Portal: <https://ers.myportallogin.com/>.



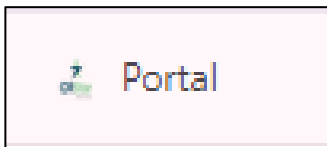
The CRStar Client Portal only supports the Google Chrome™ web browser, although the portal may work in other browsers. To bookmark the page in Chrome, click the Star icon in the upper right corner:



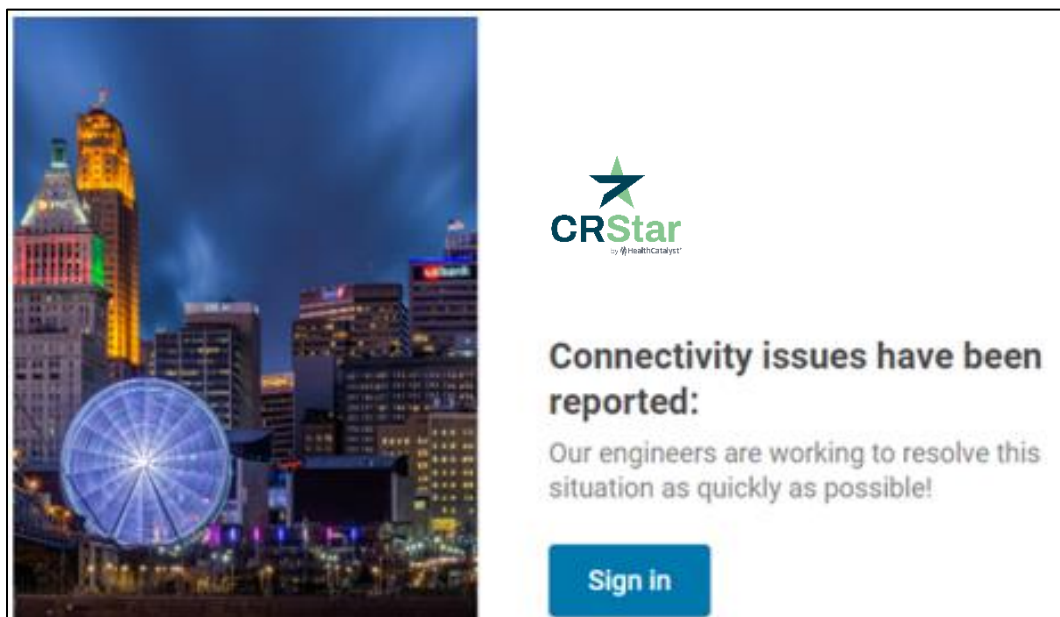
If you'd like to change the name (or just leave it Portal") or where the bookmark appears, select "Edit" and change the name or folder. Click "Done"



You should now see the Portal Icon in your Bookmarks Bar:



In the event of CRStar connectivity issues, the following screen will be displayed:

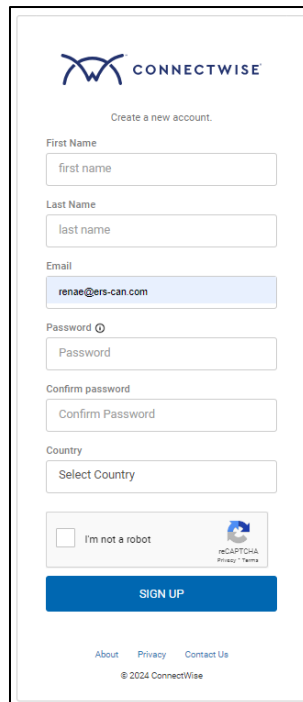


In these circumstances it is not necessary to enter a ticket as we are already aware of the problem and are working on it. We will send updates as often as deemed necessary by our crisis team. Most connectivity issues are resolved rather quickly, so we recommend you check the page often.

## Sign Up for Portal Access

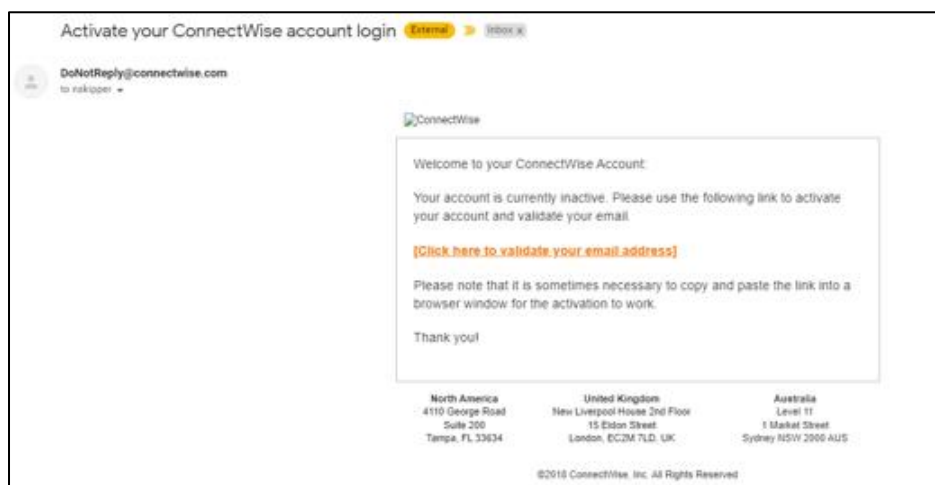
The first time you access the CRStar Client Portal, you must create an account. Click the “Sign Up” button on the homepage. You will be asked to provide some basic information and set your password. Make sure you check the “I’m not a robot” box and “Sign Up.”

Please note: The CRStar System Administrator at your facility MUST create your portal account before you can sign up for access. Contact your System Admin if you have problems signing up for portal access.

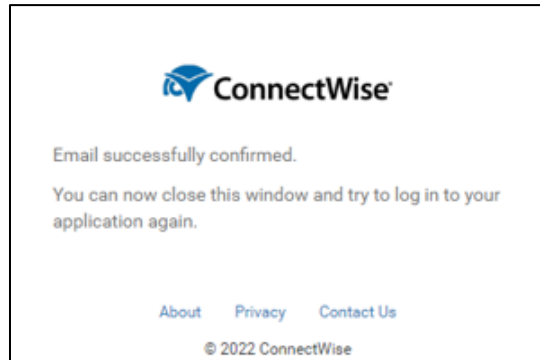


The screenshot shows the ConnectWise account creation page. At the top is the ConnectWise logo and the text "Create a new account." Below this are several input fields: "First Name" (placeholder: first name), "Last Name" (placeholder: last name), "Email" (placeholder: renae@ers-can.com), "Password" (with an eye icon), "Confirm password" (placeholder: Confirm Password), and "Country" (placeholder: Select Country). There is a checkbox for "I'm not a robot" next to a reCAPTCHA logo. A blue "SIGN UP" button is at the bottom. At the very bottom, there are links for "About", "Privacy", and "Contact Us", and a copyright notice "© 2024 ConnectWise".

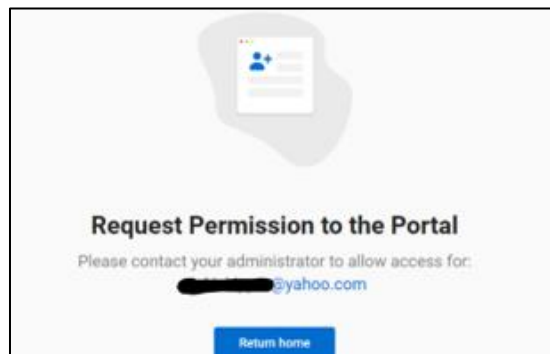
You will receive an email with a link to validate your email address:



Click on the link and you should see this confirmation:



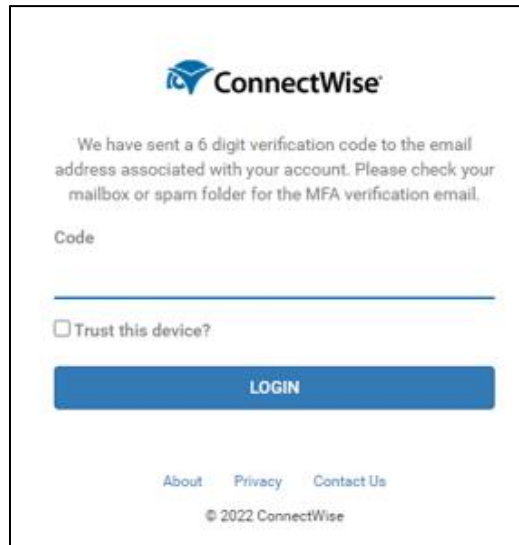
If your email is not recognized, you will get a message telling you to request permission to the portal from your system administrator:



### PLEASE NOTE

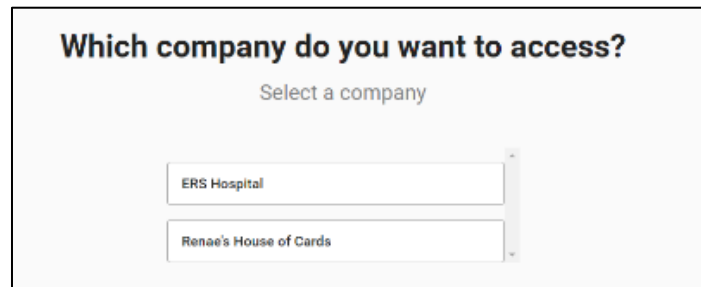
- Portal accounts are managed by the System Admin at each facility.
- If you do not have access, this must be reported to your System Admin, not CRStar by Health Catalyst staff.
- We may be able to help in an emergency, but members of the CRStar by Health Catalyst support teams do not have access to client account settings.

If your login is successful, you will receive a verification code:



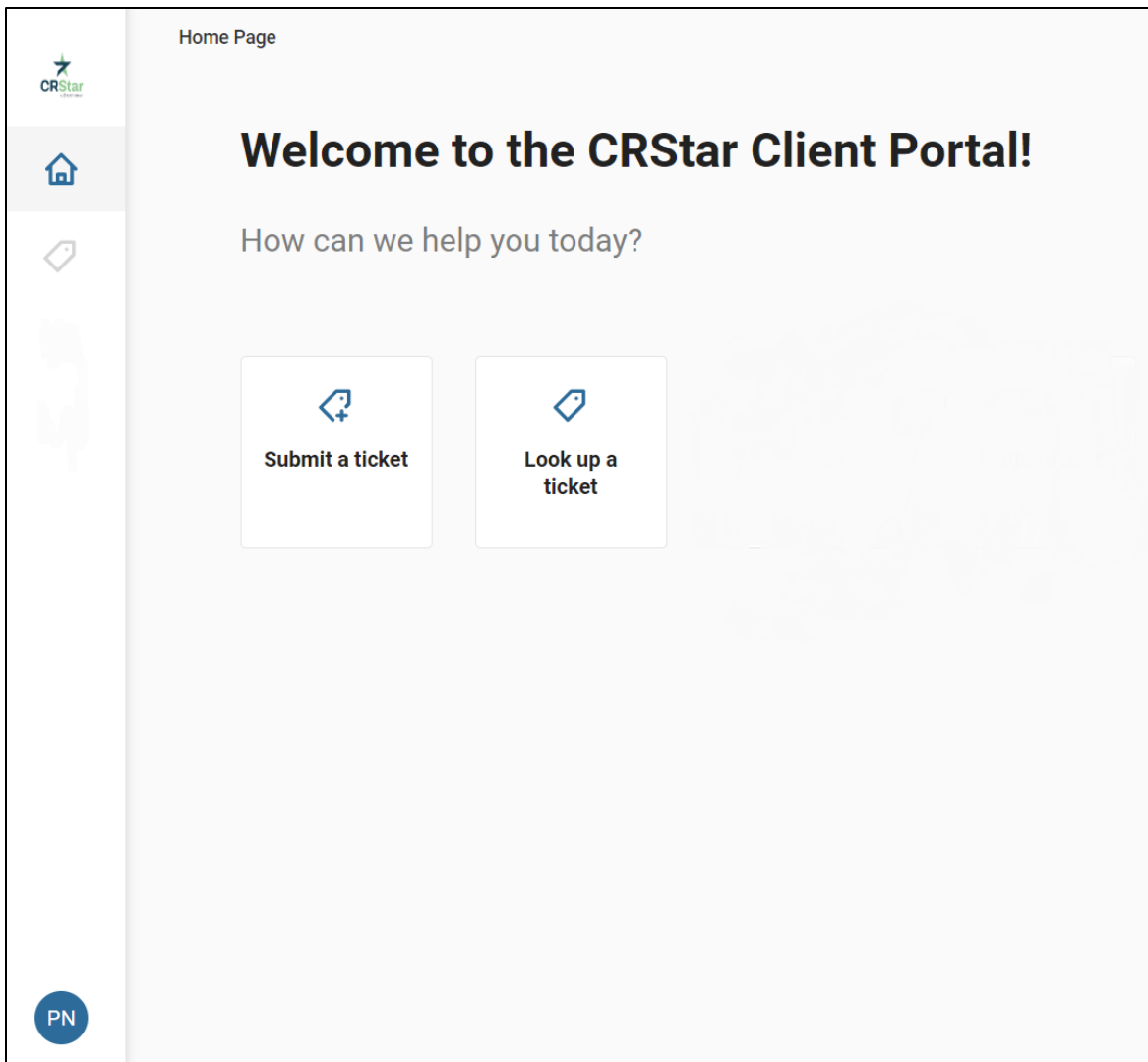
Enter the code to complete the login.

- If you work with a single facility, you will be taken directly to the Home Page.
- If you use CRStar at multiple facilities, you will be prompted to select the company for which you need support:

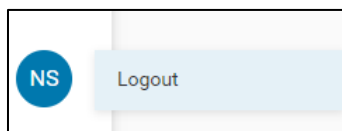


After selecting a company, you will be taken to the Home Page.

## Navigate the Home Page

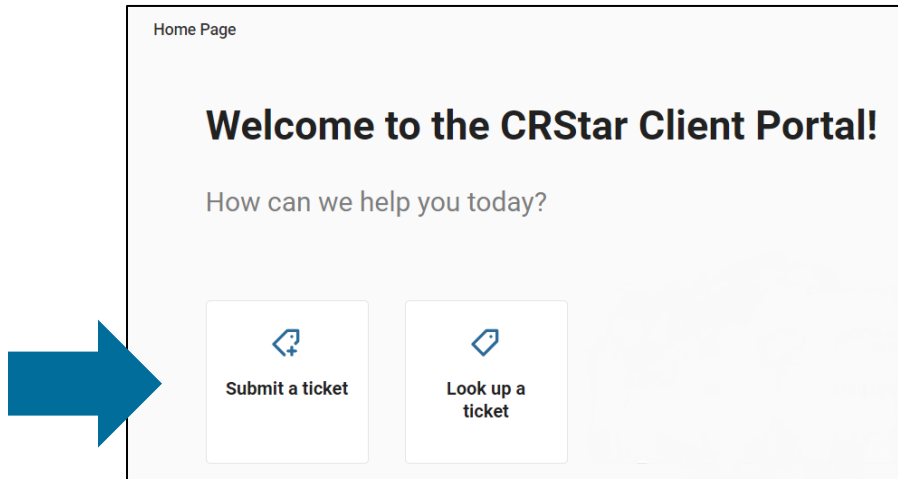


Navigating the Home Page is very simple. There are two main tabs, "Submit a ticket" and "Look up a ticket". On the left side, there is a "Home" icon (clicking this will take you to the Home Page) and a "Ticket" icon (clicking this will take you to the "Look up a ticket" page). You will see your initials in the lower left corner of the Home Page. Click on your initials and a "Logout" button will appear. Click on the "Logout" button to exit the Portal:

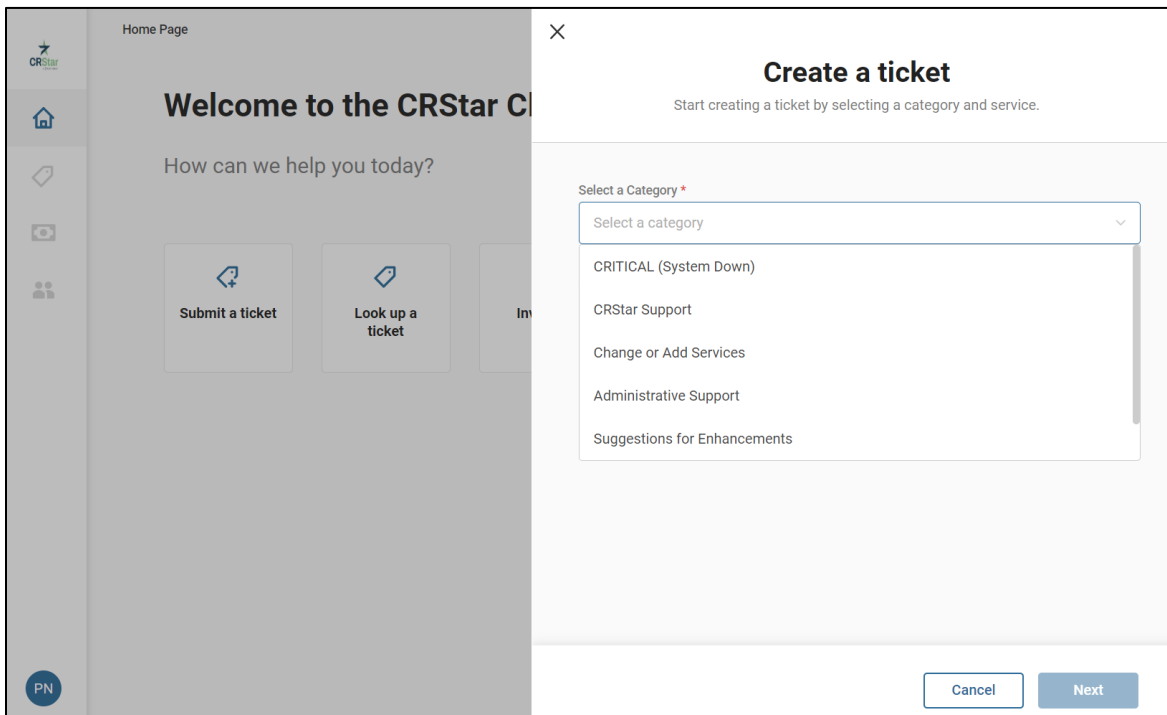


## Submit a Ticket

From the Home Page, click the “Submit a Ticket” button:



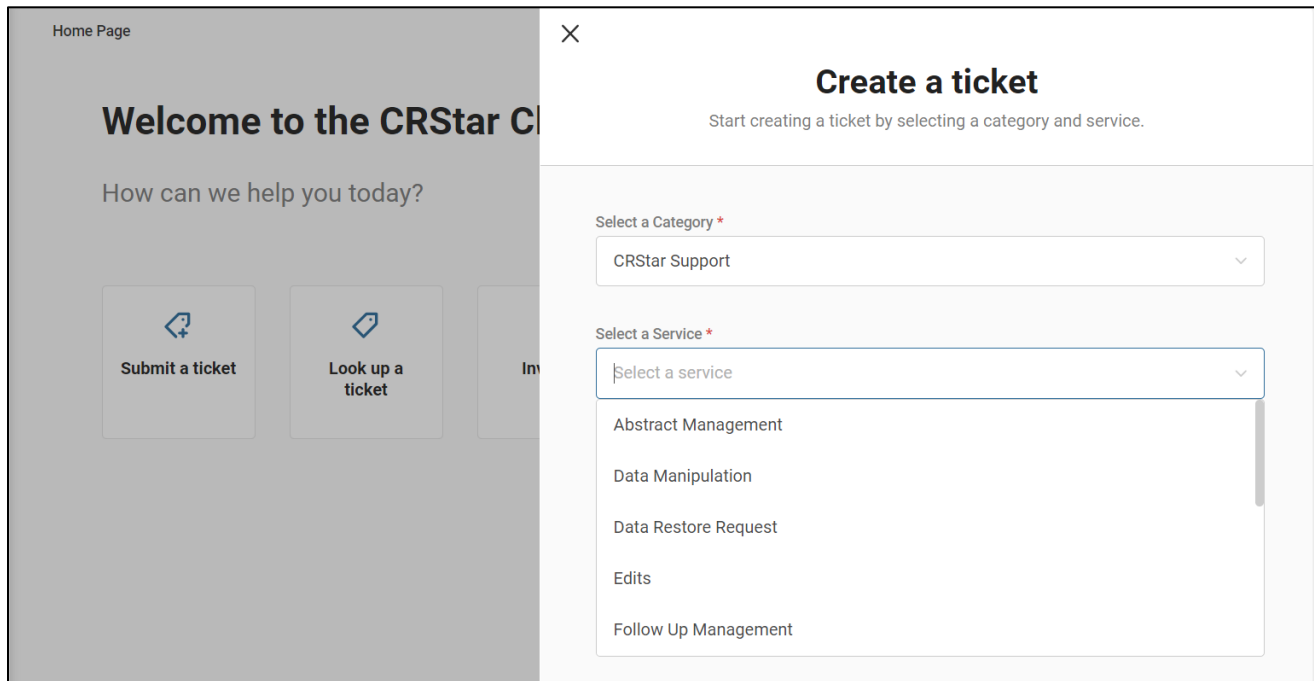
This will take you to the “Create a ticket” dialogue. First select a category. There are six categories to choose from: Critical, CRStar Support, Change or Add Services, Administrative Support, Suggestions for Enhancements, or Miscellaneous. You are required to select a category.



PLEASE NOTE: The CRITICAL category is ONLY to be used when users cannot work in CRStar due to a technical issue.



The categories CRStar Support, Change or Add Services, Administrative Support, Suggestions for Enhancements, or Miscellaneous contain multiple services. Once you have selected a category, select a service from the “Select a Service” drop down arrow:



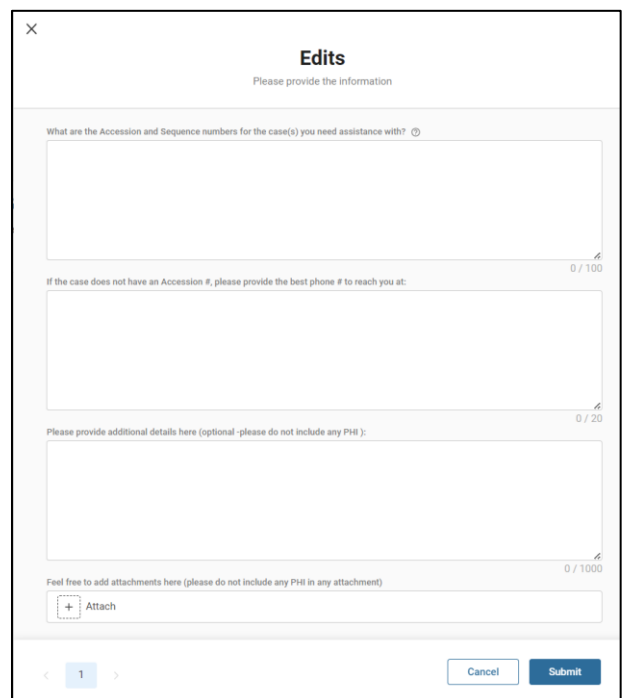
Select the service that best describes your support needs and click on that service to submit a ticket.

To the right is a screenshot of the Edits service page.

To submit a ticket, simply fill in the appropriate fields and click the “Submit” button. None of the fields are required but providing as much information as possible will enable our support staff to resolve your issue more efficiently.

Most service tickets are configured using the following three components:

1. A dropdown menu from which you can select the most appropriate response.
2. A free text field where you can provide any details that are relevant.
3. An area to upload attachments.



As stated before, none of the fields are required to enter a ticket but providing as much detail as possible will ensure that the ticket gets assigned to the appropriate staff and gets handled as quickly and efficiently as possible.

Avoid using the "Other" service selection whenever possible.

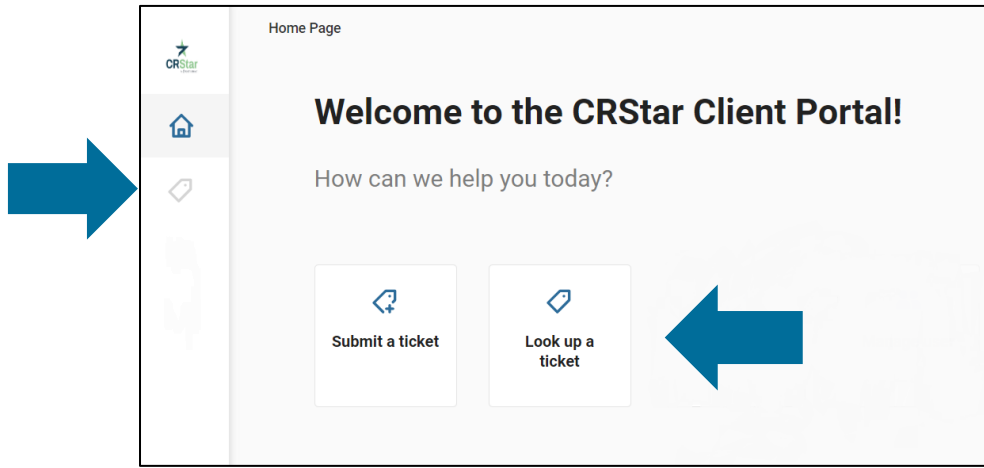
**IMPORTANT**

Do NOT include PHI or attach a document that includes PHI.

The CRStar by Health Catalyst support team deletes all PHI immediately.

## Look Up a Ticket / Check Ticket Status

From the homepage, click the “Look up a ticket” box, or click the ticket icon on the left:



This will open a list of all your open tickets. There is also a “Create Ticket” button on this page which can be used to submit a ticket. Ticket status will change as the ticket is handled (from “New” to “Assigned” to “In Progress”, etc.):

Home Page / Look up a ticket

### Tickets

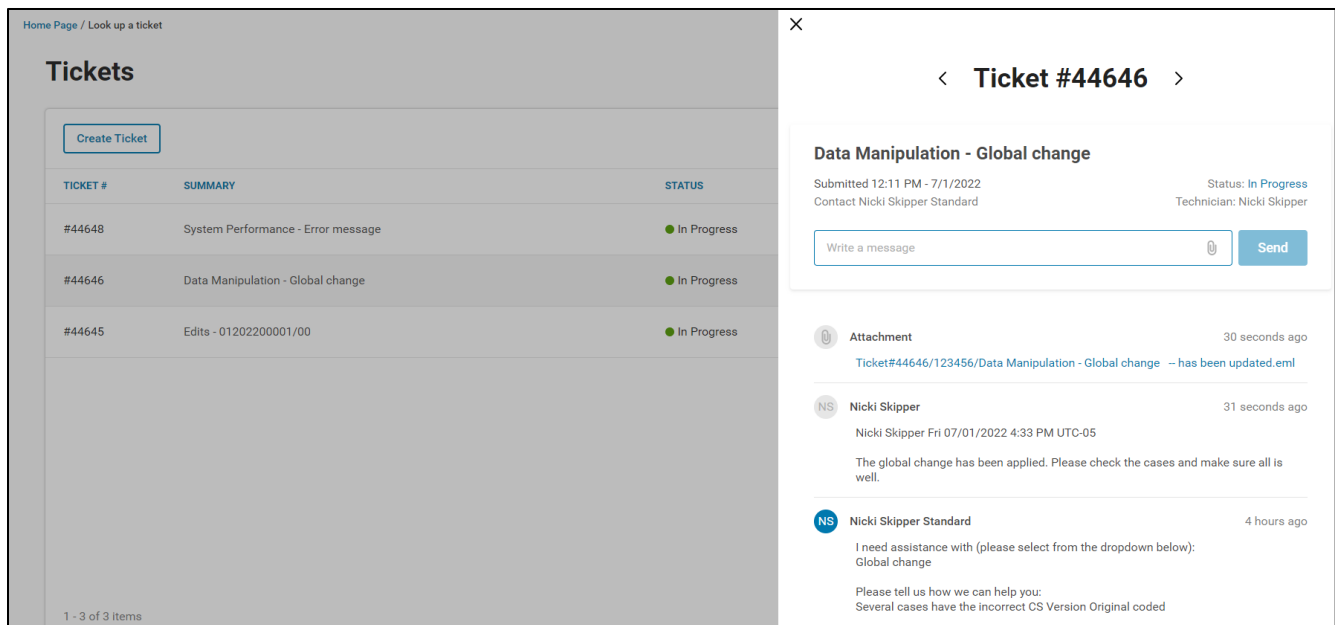
Create Ticket

TICKET #	SUMMARY	STATUS	TECHNICIAN	CONTACT
#44646	Data Manipulation - Global change	New	Unassigned	Jul 1, 2022 12:11 PM Nicki Skipper Standard
#44645	Edits - 01202200001/00	Assigned	Nicki Skipper	Jul 1, 2022 12:07 PM Nicki Skipper Standard

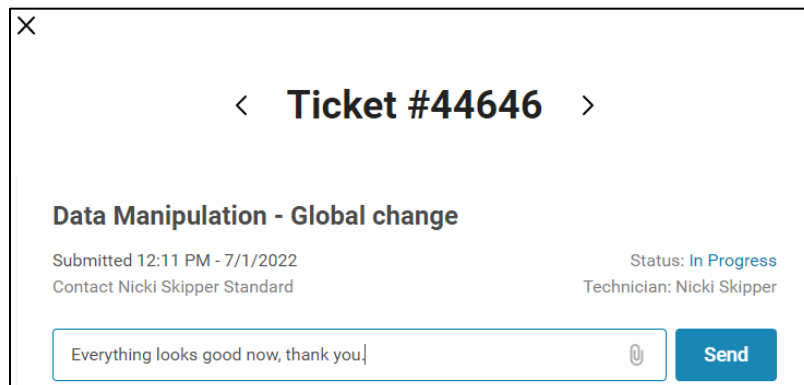
Create Ticket

TICKET #	SUMMARY	STATUS	TECHNICIAN	CONTACT
#44648	System Performance - Error message	In Progress	Bonnie Nelson	Jul 1, 2022 12:15 PM Nicki Skipper Standard
#44646	Data Manipulation - Global change	In Progress	Nicki Skipper	Jul 1, 2022 12:11 PM Nicki Skipper Standard
#44645	Edits - 01202200001/00	In Progress	Nicki Skipper	Jul 1, 2022 12:07 PM Nicki Skipper Standard

Click on any ticket to open it.

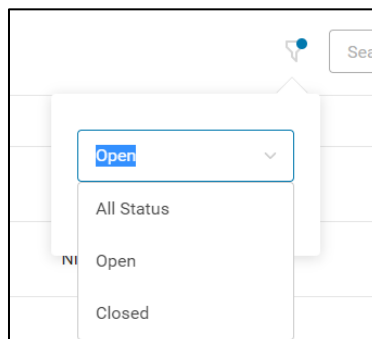


You can view all the communication in the ticket here, including any attachments. To send a message to the technician, use the “Write a message” box.

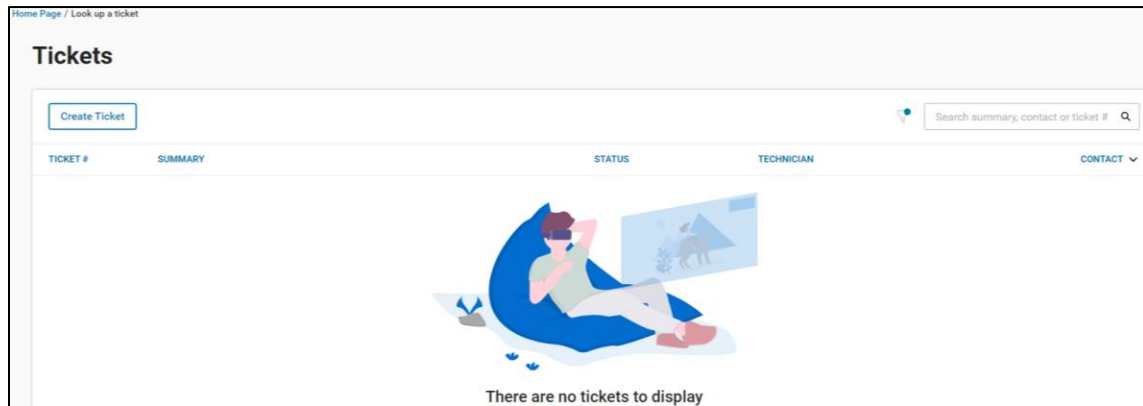


Click the black “X” in the upper left corner to close the ticket.

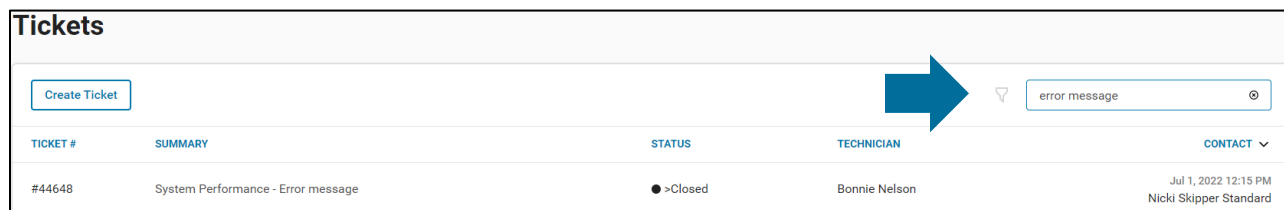
The default view shows only open tickets. Use the filter icon to view any closed tickets.



The filter icon displays a blue dot when showing only open tickets. If there are no open tickets, this view will appear:

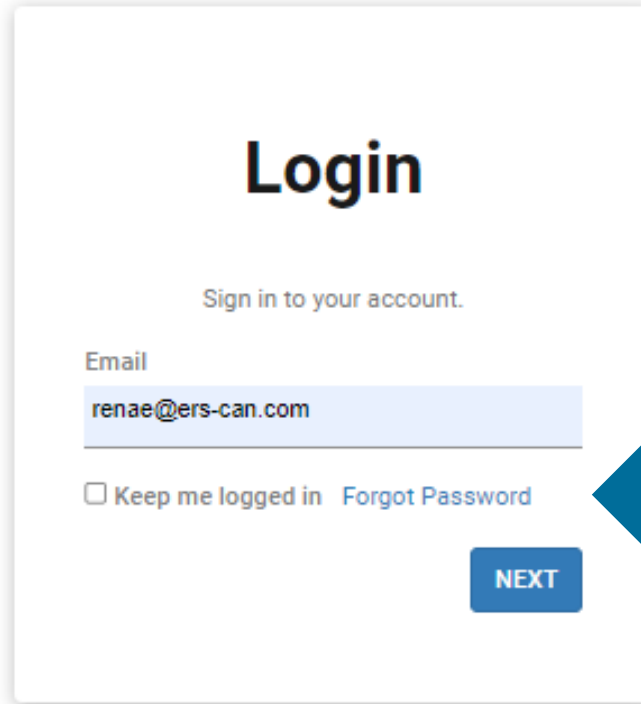


There is also a search window, where you can search by key words (from the summary), contact info or ticket #:



## Forgotten Passwords

Passwords can only be reset by each individual user. Do not report password issues to your system admin or to CRStar by Health Catalyst staff. To reset your password, enter your email address on the login screen and click the "Forgot Password" link. An email will be sent with a link to reset your password.



The image shows a login form with the following elements:

- Header:** "Login" in large, bold, black font.
- Sub-header:** "Sign in to your account." in smaller, gray font.
- Email Field:** A text input field with the label "Email" and the value "renae@ers-can.com".
- Options:** A checkbox labeled "Keep me logged in" and a link labeled "Forgot Password".
- Next Button:** A blue button labeled "NEXT".

A large blue arrow points from the right side of the page towards the "Forgot Password" link.

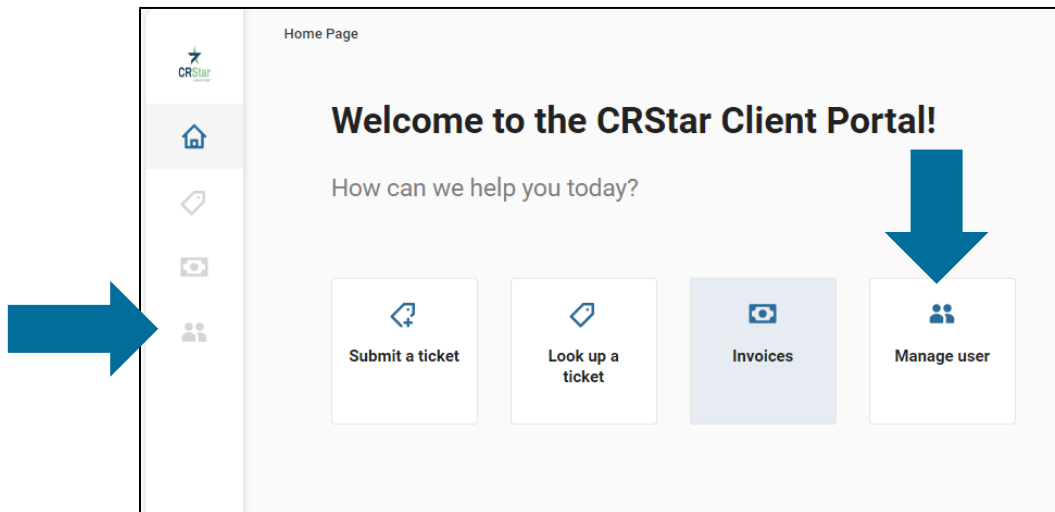
## User Management (for System Administrators)

In addition to the “Submit a ticket” and “Lookup a ticket” functions, system admins have access to “Manage user” functions.

### PLEASE NOTE:

Although you will see a “Make a payment” button, this function is not in use at this time.

To get to the user management screen, click the “Users” icon from the left toolbar or click the “Manage user” box on the main screen:

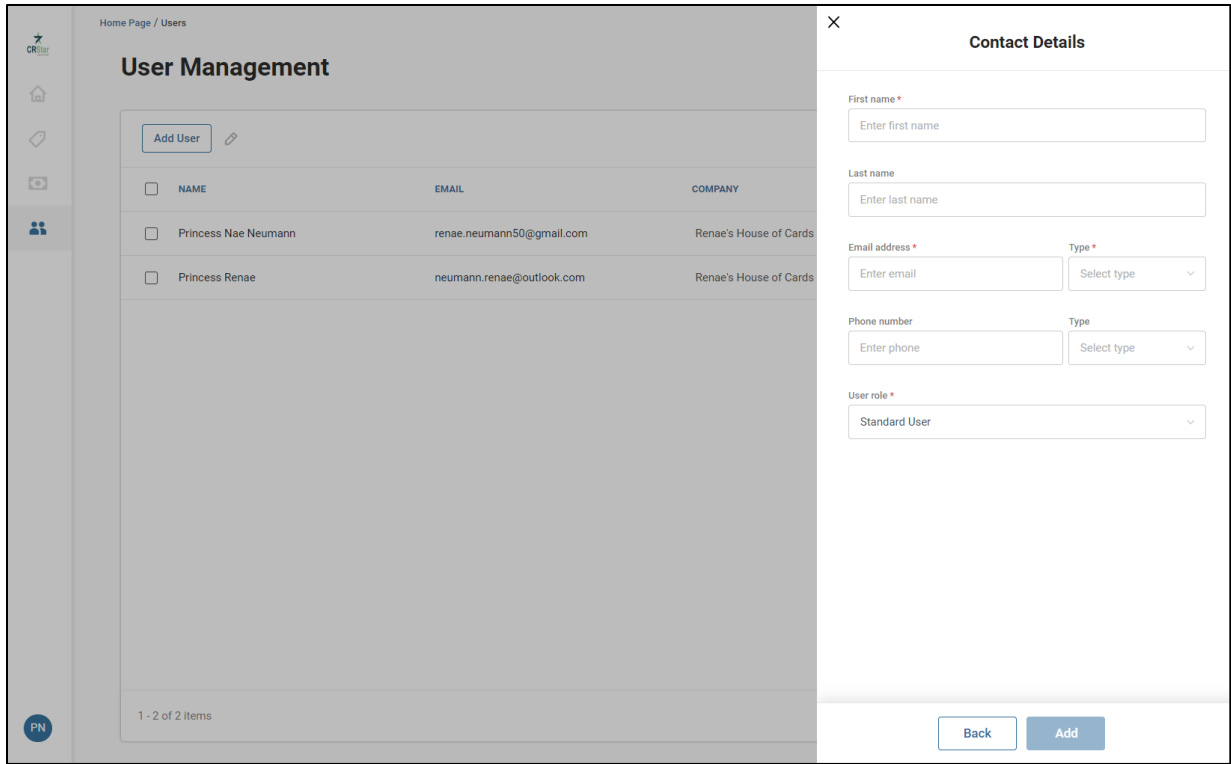


The User Management screen lists all users, their emails, company name and roles (level of permissions in the Portal):

User Management				
Add User			Search by name	
<input type="checkbox"/>	NAME	EMAIL	COMPANY	ROLE
<input type="checkbox"/>	Jonathan Test	jrakestrawtest@mycrstar.com	ERS Hospital	Full Admin
<input type="checkbox"/>	Katelyn Test	katelyntest@ers-can.com	ERS Hospital	Full Admin
<input type="checkbox"/>	Laura Test	lauratest@mycrstar.com	ERS Hospital	Full Admin

To search for a user, use the search box in the upper right corner.

To add a user, click the “Add User” box in the upper left corner. The “Add a new contact” dialog will open. Enter the name, email, and phone information, then select a user role from the dropdown and click “Save”:



“Standard User” is the default role selected. Available roles are listed below:

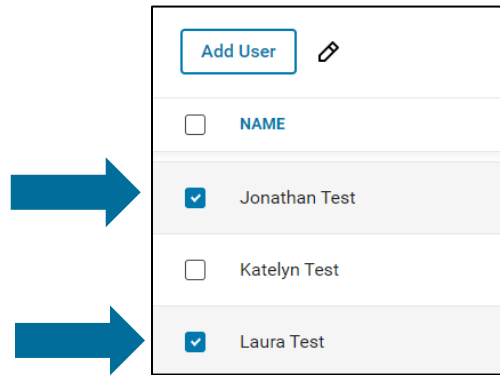
	Log in to the portal	Submit a ticket	Look up own tickets	Look up all user tickets	View Invoices	Make a payment	View a project	Manage a user
Full Admin	✓	✓	✓	✓	✓	✓	✓	✓
Ticket Manager	✓	✓	✓	✓			✓	
Billing Admin	✓	✓	✓		✓	✓	✓	
Ticket Read-Only	✓		✓					
Standard User	✓	✓	✓					
No Access								

**PLEASE NOTE:**

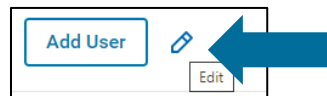
Invoices, payments, and projects are not currently available through the CRStar Client Portal.



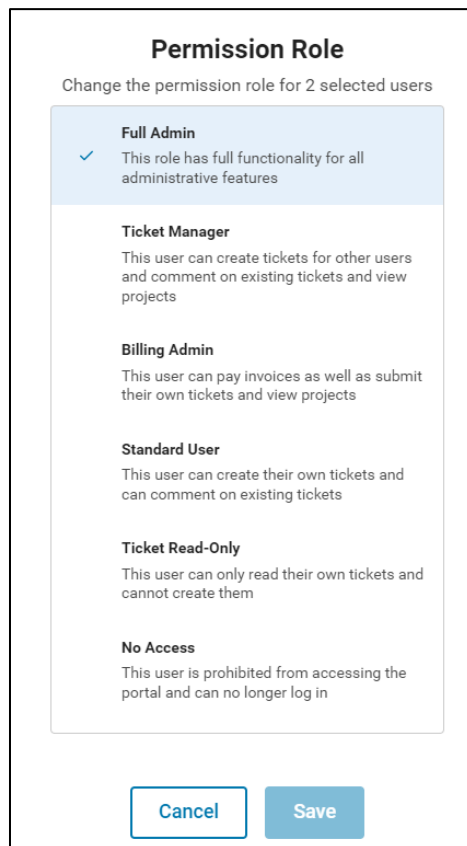
User roles can be edited one at a time or in groups. To select users, check the box next to the users' names:



Checking any box will activate the edit icon (the pencil icon). Click on the icon to open the edit dialog:



Select the role you wish to assign the user(s) and click "Save".



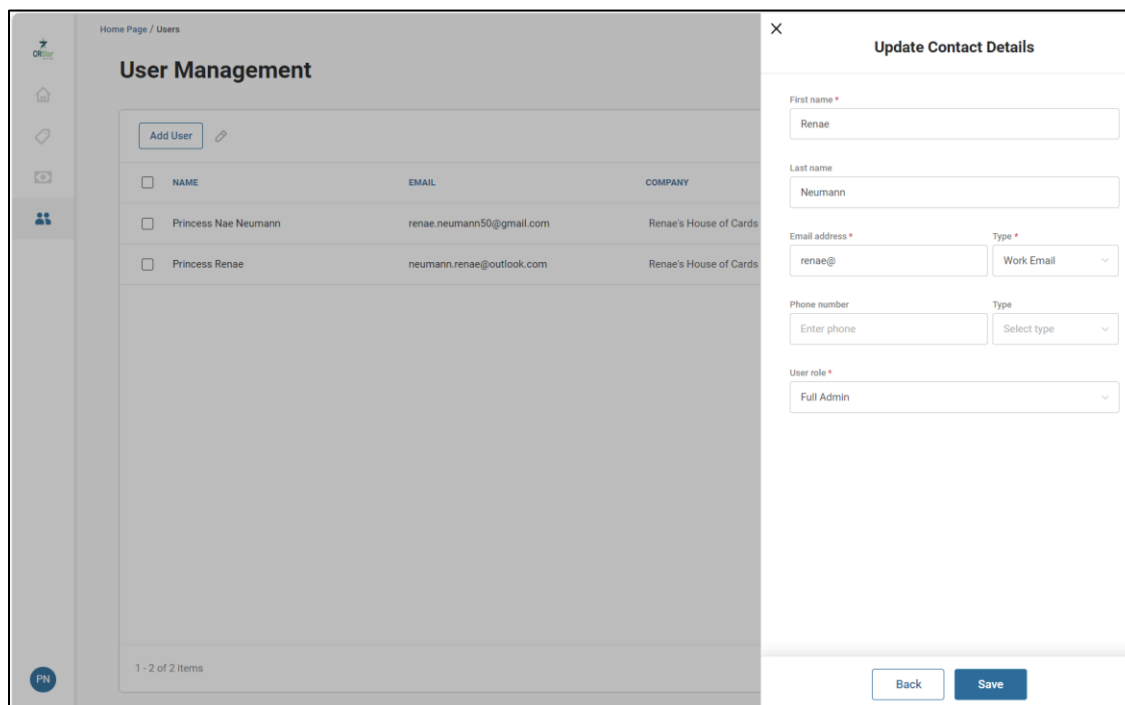
To update a user's contact information, click on the user (each user will turn grey as you hover your mouse over it):



A screenshot of a user management interface. At the top left, there is a blue button labeled "Add User" with a pencil icon. Below it is a table with two columns: "NAME" and "EMAIL". The first row is highlighted in grey and contains the text "Jonathan Test" under "NAME" and "jrakestrawtest@mycrstar.com" under "EMAIL".

<input type="checkbox"/>	NAME	EMAIL
<input type="checkbox"/>	Jonathan Test	jrakestrawtest@mycrstar.com

This will open the "Update contact" dialog:



A screenshot of a web application showing a "User Management" page on the left and an "Update Contact Details" dialog box on the right. The dialog box contains several form fields: "First name" (filled with "Rena"), "Last name" (filled with "Neumann"), "Email address" (filled with "renae@"), "Type" (dropdown menu with "Work Email" selected), "Phone number" (input field with "Enter phone" placeholder), "Type" (dropdown menu with "Select type" selected), and "User role" (dropdown menu with "Full Admin" selected). At the bottom of the dialog are "Back" and "Save" buttons.

Click "Save" to save your changes.