



CRStar Client Portal

Quick Start Guide for System Administrators

Following current policy, Client System Admins are responsible for maintaining the users at their facility for the CRStar Client Portal. Below are instructions to access the CRStar Client Portal and how to add or edit the users in your account.

The first time you access the CRStar Client Portal, you must create an account using your email address. You will only need to sign up for the CRStar Client Portal the first time you access it. Once you are signed up, you will only need to enter your email address, password, and the MFA verification code when you need to submit a ticket.

Quick Start Steps:

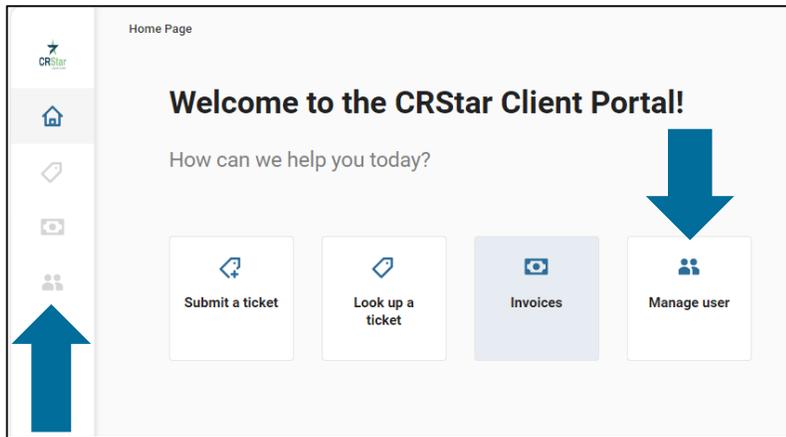
- a. Access the CRStar Client Portal: <https://ers.myportallogin.com/>
- b. Click the "Sign Up" button.
- c. Enter the requested information. Please note: You will be selecting a password.
- d. Click the blue "Sign Up" button.
- e. You will receive an email with a link to validate your email address.
- f. Click on the link to confirm your email address.
- g. On the portal screen, follow the instructions to log in.
- h. Once you log in, you will be emailed an MFA verification code. Enter the code to complete the login.
 - a. If you work with a single facility, you will be taken directly to the Home Page.
 - b. If you use CRStar at multiple facilities, you will see several company names listed. Select the company for which you need support. You will now be taken to the Home Page.

PLEASE NOTE

- Google Chrome is the preferred browser although the portal may work in other browsers. If you have problems in a non-Chrome browser, please try again in Chrome.
- If your email address is not recognized, please alert a CRStar by Health Catalyst team member and we will determine the issue and facilitate your access.
- Users at your facility will be instructed to contact the System Admin at their facility for any access issues related to the email address not being recognized by the CRStar Client Portal.
- Only a registered user can change the Client Portal password. System Admins and CRStar staff no longer have that ability.

User Management & Permission Roles for the CRStar Client Portal

In addition to the “Submit a ticket” and “Lookup a ticket” functions, system admins have access to “Manage user” functions. To access the user management screen, click the “Users” icon on the left toolbar, or click the “Manage user” box on the main screen.



PLEASE NOTE:

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

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
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

Available roles are listed below. FYI – “Standard User” is the default role and can only be changed by a Portal System Admin (someone designated with “Full Admin” role in the Client Portal).

PLEASE NOTE: Invoices, payments & projects are not currently available through the Client Portal.

	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								

1. User roles can be edited one at a time or in groups.
 - a. To change one user's permission role, check the box next to their name.
 - b. To change multiple users to the same permission role, check the boxes next to multiple users' names.
2. Click the edit icon (the pencil icon) to open the edit dialog.
3. Select the role you wish to assign the user(s)
4. Click "Save"

PLEASE NOTE: If a user no longer needs access to the Client Portal, please change their permission role to "No Access"

Permission Role
Change the permission role for 2 selected users

Full Admin
This role has full functionality for all administrative features

Ticket Manager
This user can create tickets for other users and comment on existing tickets and view projects

Billing Admin
This user can pay invoices as well as submit their own tickets and view projects

Standard User
This user can create their own tickets and can comment on existing tickets

Ticket Read-Only
This user can only read their own tickets and cannot create them

No Access
This user is prohibited from accessing the portal and can no longer log in

Client Management – Updating Contact Information & Adding New Contacts

To update a user's contact information in the CRStar Client Portal:

1. Click on the user (don't check the box)
2. The "Update contact" dialog will open.
3. Update any necessary information.
4. Click "Save"

Reminder: System Admins cannot change passwords. A password change can only be performed by the person with the listed email address.

PLEASE NOTE: If a user no longer needs access to the Client Portal, please change their permission role to "No Access"

Update Contact Details

First name *
Renee

Last name
Neumann

Email address *
renee@

Type *
Work Email

Phone number
Enter phone

Type
Select type

User role *
Full Admin

To add a user to the New Client Portal:

1. Click the "Add User" box in the upper left corner
2. The "Add a new contact" dialog will open
3. Enter name, email address and phone information
4. Select a user role from the dropdown menu
5. Click "Save"

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Contact Details

First name *
Enter first name

Last name
Enter last name

Email address * Type *
Enter email Select type

Phone number Type
Enter phone Select type

User role *
Standard User

Back Add

Instructions regarding entering tickets and more can be found in the following document, CRStar Client Portal Instructions, which can be found in the Policies and Procedures section of the CRStar Resource Page.