Case Portal FAQ

Overview

Case Portal is a helpful resource for reporting and monitoring issues you and other authorized users from your firm submit to Morningstar's Support team about ByAllAccounts.
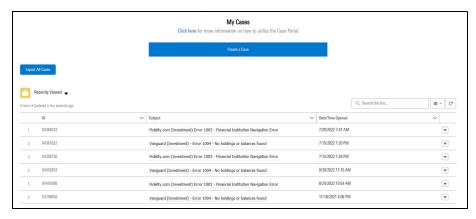
This document addresses the following common questions about Case Portal:

MORNINGSTAR Wealth

Can I look up a case if I forgot my case ID?

Yes! Even without the case ID, you can use the search feature to pull up cases that include key words or phrases in the description field. Additionally, you can sort the dashboard columns - such as by date/time opened or contact name - to help you find a case you're looking for.

What types of additional files can I upload when reporting an issue?

We recommend including all available relevant documentation when reporting an issue. You will have the option to select existing files that have been referenced in other cases - including those owned by you and those shared with you. A common example is to include a screenshot as a .PNG or .JPG file. Alternatively, you could include .PDF, .DOC, .PPTX, .XLSX and more common file types. You can upload a maximum of 10 files in the initial report, and continue to provide additional documentation as needed within the case discussion thread.

Why can't I see cases submitted directly through AccountView or via email?

Cases submitted through AccountView or direct email will display in Case Portal only if the reporting email address matches what's on record for an authorized Case Portal user from your firm. We recommend using the same email address for all reporting methods to ensure the greatest visibility.

What information is contained in a case export?

When you select **Export All Cases** from the home dashboard, a .CSV file is automatically generated containing the following information: case number, subject, status, origin, date created, last date modified, and contact name. Note that this function exports ALL cases that were submitted. The content of the .CSV sheet is not specific to the list view you are on.

Where can I access additional information on how to utilize the Case Portal?

Additional information is available at https://community.morningstar.com/s/case-portal-overview. This link is also available on the Case Portal home page.