



# WyoFolio: *Building Cases*



# Overview

1. Case Templates

2. Committees

3. Build a Case



# Case Templates

# Finding Templates

On the menu to the left of your dashboard, you will find the WyoFolio module under the WyoVita module.

To access pre-built templates or to build your own template, click on Templates.

WyoFolio

Cases

Templates ←

Administration

Reports

Users & Groups

Search by title or unit

Q

university of wyoming

14 of 14 templates.



Title ▼	Unit ◆	Type	Dossier Visibility ?	
<div>Annual Review GOALS ONLY 2025</div> <div>Annual Review GOALS ONLY 2025</div>	University of Wyoming	Review	Yes	<div>Options ▼</div>
<div>Post Tenure Review</div> <div>Post Tenure Review Master</div>	University of Wyoming	Other	Yes	<div>Options ▼</div>
<div>URTP - Special Circumstances - AA USE ONLY</div> <div>URTP only - Intent to terminate, etc</div>	University of Wyoming	Other	No	<div>Options ▼</div>

# Templates List

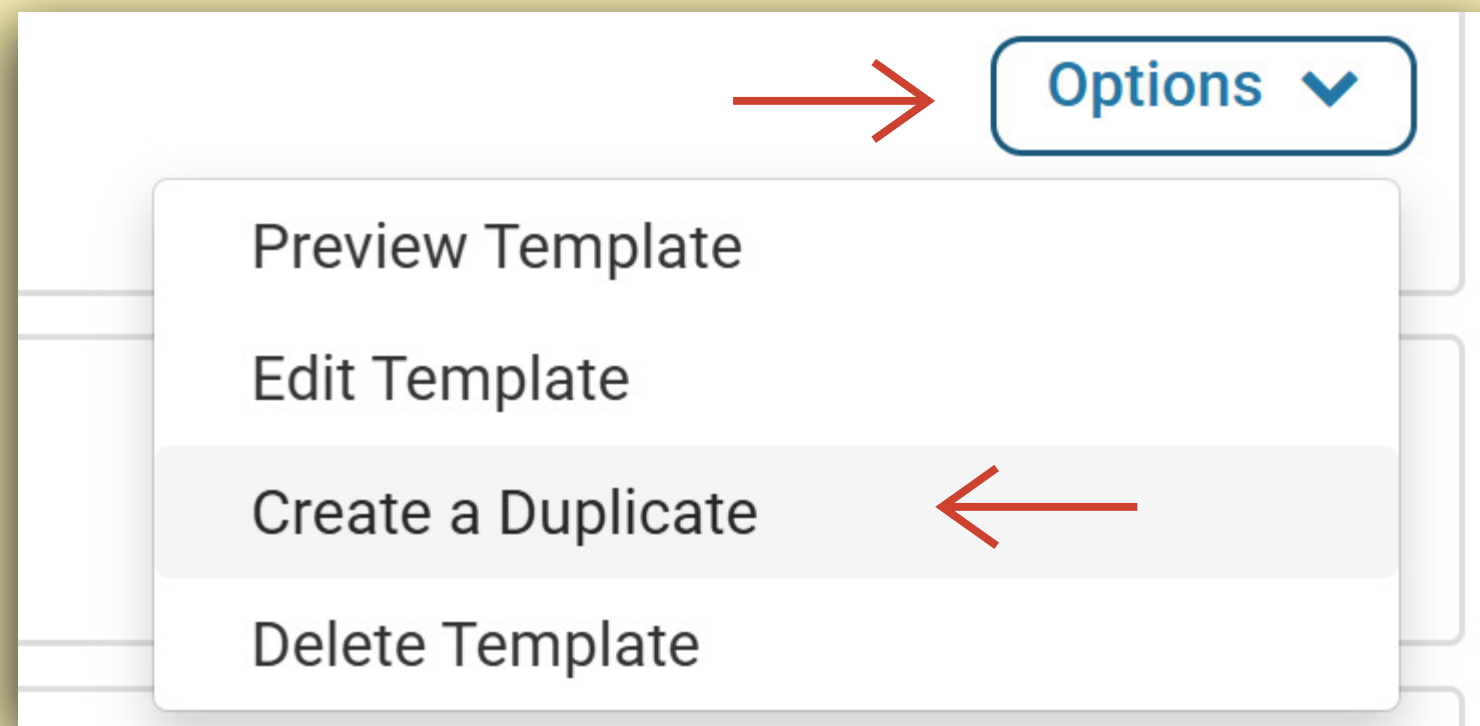
On this page you will find all of the templates that are available for your use. Academic Affairs creates master templates for most case types, so it is rare that you will need to build a template from scratch. To more easily find our master templates, type University of Wyoming in the search bar to narrow down the results, or type in the name of the template you are looking for.



# Duplicating Templates

In most cases, you will likely need to customize templates based on your college's procedures, as well as department level committee needs. To do this, you will need to duplicate the master template and edit the copy.

To duplicate a template, click on Options beside the relevant master template to expand the dropdown, then click Create a Duplicate.





# Template Information

Unit ⓘ

University of Wyoming

←

Type \*

Review

▼

Title \* ⓘ

UW - Annual Review Calendar Year 2024 Master (copy)

←

Description \* ⓘ

Annual Review Calendar Year 2024

←

Creating a Template

1

Template Information

2

Candidate Requirements

3

Internal Case Sections

4

Case Review Steps

5

Template Summary

# Template Information

For this example, we will be customizing an annual review template for a department. The three things you will need to change are the unit, the title, and the description (if desired).

Search for the relevant department under Unit to change the unit, then type a new title and description. We recommend the below naming convention example for titles.

College Abbreviation - Annual Review Calendar Year 202# (Department Name)

(EX.) A&S - Annual Review Calendar Year 2025 (Anthropology)

Save & Continue

Return to Template Summary

←

Click Save & Continue at the bottom to move on to the next step.



# Candidate Packet Settings

In the first section of Candidate Requirements, you will have the opportunity to add any additional instructions for candidates. While you generally shouldn't change the existing instructions, feel free to add any college or department specific guidelines.

## Candidate Packet Settings

### Packet Deadline Type

The deadline type displayed below is set by an Administrator and applies to all cases across the institution. If necessary, you can use the Edit Packet Settings button to change the deadline type for the current template, and the new deadline type will be applied to all cases that use the template.

### Soft Deadline

Candidates can submit packets after the deadline.

### Candidate Packet Section Settings

Don't allow candidates to add their own sections.

Edit Packet Settings

### Candidate Instructions

Add instructions to the candidate about assembling their packet, procedures, policies, or deadlines at your institution. You can also include links to required forms and online resources.

| **B** *I* T<sub>x</sub> | := | | Ω

**Faculty member uploads required documents:**

- CV – autogenerated from WyoVita
- Narrative (one to three pages)
- Goals from calendar year 2024
- Goals for calendar year 2025 (will be submitted using the form in the case)
- Instructional appointment credentials (diploma/transcript for highest degree earned). If you have already provided these documents, you do not need to submit them again. Tenure track and tenured faculty do not need to submit any material for this requirement. Academic Affairs should already have those on file.





# Vita Templates

If your college or department has a specific Vita template, you will need to click Change to switch the pre-loaded template. On the right of your screen, you will then see a pop-up window where you can edit the Vita information. Click Change Selected Vita to switch the template, then click Add Vita to save.

WyoVita Vita

Vita Name

University of Wyoming Vita

Unit

University of Wyoming

Number of Terms

Previous 5 Terms

CHANGE

REMOVE

Add Vita

Number of Terms \*

The terms for your institution are: Fall, J Term, Spring, Summer. Select the number of terms that the vita will cover. The term number is inclusive of the current term at the point of case creation.

5 term(s)

Select Vita Type \*

☒ Legacy Vita (WyoVita)

☐ Vita (New Vita Builder)

Select Vita \*

StandardCV

University of Wyoming

CHANGE SELECTED VITA

Vita Section Preview

1. Contact Information

2. University Department and College

3. Current Position

4. Professional Licensures & Certifications

5. Degrees

6. Rank and Promotion History

7. Institutional Appointments

8. Work Experience

9. Military Experience

10. Honors

11. Interests

12. Workload Distribution - Summer 2022 forward

ADD VITA

CANCEL





# Packet Requirements

The Packet Requirements section is where you can customize candidate submission requirements for a particular case. To add a requirement to a specific section, click Add Requirement beside the section you wish to edit. To add a new section with its own requirements, click Add Section at the top.

Packet Requirements

Create packet sections for materials you would like to receive from a candidate. Each section can contain a due date, a description, and requirements for particular materials (e.g., CV, teaching statement, syllabi).

Candidate Documents

Narrative/Annual Report

1 required

Please follow college or unit guidelines for narrative.

Goals from 2024

1 required

These are the goals the faculty member set during the 2023 review.

Other Documents

optional

Determined by Academic Unit and/or College

Instructional Appointment Credentials

up to 1 optional

Faculty who have already submitted their transcripts to Academic Affairs do not need to submit any material for this requirement.

The Higher Learning Commission (HLC), our accrediting agency, issued specific requirements for faculty credentials to teach university-level courses. As a requirement of our continued accreditation, all instructors who teach at or for UW must hold:

A master's degree or higher in the discipline in which they are teaching, **OR**

A master's degree or higher in another discipline AND a minimum of 18 graduate credit hours in the discipline in which they teach, **OR**

A combination of education, training, and tested experience (testable/measurable experience, significant research, training, industry certification, professional licenses) that the



Goals for upcoming year



Preview



Continue

Previous

Return to Template Summary



# Candidate Forms

For annual review cases, you will see that there is a form for them to fill out. These forms are created by Faculty Affairs and exist within WyoFolio, so they are built into your case. The candidate does not need to upload anything for these forms. They will fill out the form in WyoFolio and their responses will be automatically recorded in their case for reviewers to see.

To move on to the next step, click Continue at the bottom.



# Sections

Department Head Evaluation

→

EditRemove

Supervisor Evaluation

in use

EditRemove

Dean/Director Evaluation

in use

EditRemove

+ Add Section

Add External Evaluations Section

←

# Case Sections

The Internal Case Sections are where the reviewers will upload their documents. There are typically already case sections built into these templates for you, so you may not need to make any changes. If you do need to add or remove sections, you can do that here. You can also edit the section name to fit departmental needs by clicking Edit beside the section. If the template is already in use and has reached these steps, however, you will not be able to remove that section.

Settings

Internal case sections will appear:

☐ Above the candidate packet

☒ Below the candidate packet

The settings will be preselected and should not change.



# Case Review Steps

The review steps begin when the candidate submits their packet. Here you can make any necessary changes to these steps based your department or college's needs. For instance, units where the Dean or Director is the direct supervisor may not need both the Supervisor and Dean review. You can delete one of those steps to make the process simpler.

# Case Review Steps

+ Add Step

Additional Options ▾

1

Joint Appointment (SER, etc)

Academic Level: University Colleges/Schools Departments Extension/R&E

TEST (0)  
No Instructions 1 Required Document No Required Forms

Edit | Delete

2

Supervisor annual performance evaluation

Academic Level: University Colleges/Schools Departments Extension/R&E

Supervisor Review (0)  
No Instructions No Required Documents 1 Required Form

Edit | Delete

3

Dean Review

Academic Level: University Colleges/Schools Departments Extension/R&E

TEST (0)  
No Instructions No Required Documents 1 Required Form

Edit | Delete

We will cover how to set up and select committees for these review steps in the next section.







# Committees

# Users and Groups

On the menu to the left of your dashboard, click on Users & Groups under WyoFolio to access existing committees.

WyoFolio

Cases

Templates

Administration

Reports

Users & Groups





# Users, Committees & Units

Search by committee name

Q

Search Committees

Sort By Name ▼

Browse By All Units ▼

→

Download

+ Add Committee

## Search for a Committee

There are many established committees already in WyoFolio. If you aren't sure which committee you need to select in a case review step, this page is a good place to start. You can search for a committee by name using the search bar, or you can use Browse By All Units to only view a specific subunit's committees.

Users

Committees

Units

Academic Levels

Search by committee name

Q

Search Committees

Sort By Name ▼

Browse By VP Academic Affairs Office ▼

Download

+ Add Committee

Committee Name	Unit		
Provost - Dean	VP Academic Affairs Office	→ 1	→
Provost - Department Head	VP Academic Affairs Office	→ 1	→

In the list of committees, you can see the number of people assigned to a certain committee. To view the details of the committee, click the pencil icon to the right.



# Edit a Committee

A pop-up window will appear where you can view and edit committee members. If the correct users are assigned to the selected committee, you can click the blue X at the top right of the pop-up window to go back to the committees list. If you need to change the committee members, you can click the gray X beside a name to remove that member, then Search Users to add new members. Once your committees are set up how you need them, you can go back to your template to add committees to your review steps.

Edit Committee

Name \*

Provost - Dean

Unit

VP Academic Affairs Office

✓ Update

Committee Members

KC

Kelli Cool  
kcool2@uwyo.edu

☆

×

Search Users

Sort By Name

A mascot character in a cowboy costume is running on a green field, holding a large yellow flag with a red silhouette of a cowboy on a bucking horse. In the background, a band member is visible playing a brass instrument.



2

Supervisor annual performance evaluation

→

Edit | Delete

Academic Level:

University

Colleges/Schools

Departments

Extension/R&E



Supervisor Review (0)

⊖ No Instructions

⊖ No Required Documents

1 Required Form

# Add Committees to Review Steps

We have now returned to the Case Review Steps section of our template. To assign a committee to your steps, you will click on Edit to the right of each step.

Reviewers

+ Add Committee

▼

Supervisor Review

Ad Hoc Committee (0)

Manage Members

Instructions

Required Documents

Required Forms

Settings

👤 No Members

Options ▼

Replace Committee

→

Click Options, then click Replace Committee to search for and add the needed committee to this step. Repeat as needed with the rest of the steps.



# Template Summary

Once your case review steps look the way you want them, you can click Continue at the bottom to review your template on the Template Summary page.

1

Supervisor annual performance evaluation

Edit | Delete

Academic Level: University Colleges/Schools Departments Extension/R&E

Provost - Department Head (1)

No Instructions No Required Documents 1 Required Form

2

Dean Review

Edit | Delete

Academic Level: University Colleges/Schools Departments Extension/R&E

Provost - Dean (1)

No Instructions No Required Documents 1 Required Form

3

Academic Affairs Review

Edit | Delete

Academic Level: University Colleges/Schools Departments Extension/R&E

Academic Affairs (3)

No Instructions No Required Documents No Required Forms

Continue

Previous

Return to Template Summary







# Build a Case



# Cases

On the menu to the left of your dashboard, click on Cases under WyoFolio to access existing cases, and to build new cases.

WyoFolio

Cases



Templates

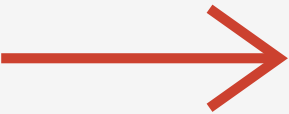
Administration

Reports

Users & Groups



# Cases



CREATE CASE

Search cases



Filter



25 of 203 cases

Filtered By: Active Cases ×

# Create a New Case

On the Cases page, click on Create Case in the top right of the screen.

In the first step, click Select Candidates to choose the faculty members you wish to create a new case for.

1

Select Candidate(s)

Candidate Information

Selected Candidates

A candidate has not been selected. Once you

+ SELECT CANDIDATES





# Select Candidates

Search for the relevant unit in the search bar. You will see a list of faculty populate below based on your search. Click on the boxes beside the candidates you wish to select, then click Add Candidates at the bottom.

Select Candidates for Case Creation

VP

×

🔍

1-10 of 17 Results

Show

10

<input type="checkbox"/>	Name ↑	Unit
<input type="checkbox"/>	James Ahern JAhern@uwyo.edu	VP Academic Affairs Office
<input type="checkbox"/>	Nasser Albeirut nalbeiru@uwyo.edu	VP Academic Affairs Office
<input type="checkbox"/>	Chicory Bechtel cbechtel@uwyo.edu	VP Academic Affairs Office
<input type="checkbox"/>	Tami Benham-Deal benham@uwyo.edu	VP Academic Affairs Office
<input type="checkbox"/>	Andrea Hastings GRACE@uwyo.edu	VP Academic Affairs Office
<input type="checkbox"/>	Jake Hayden JakeH@uwyo.edu	VP Academic Affairs Office
<input type="checkbox"/>	Kathie Hull KHull@uwyo.edu	VP Academic Affairs Office
<input type="checkbox"/>	Blake Johnson biohn130@uwyo.edu	VP Academic Affairs Office

1

2

➤

ADD CANDIDATES

CANCEL





# Select Template

The next step is selecting your template. Select your case settings (unit and case type), then click on the circle beside the needed template below.

Select Case Settings

Unit for Case(s) \*

Cases can only be created in one unit.

VP Academic Affairs Office

Type

Review

Search

1-7 of 7 Templates

Template Information	
<input type="radio"/>	<a href="#">UW - Annual Review Calendar Year 2023 Master (copy) DO NOT USE</a> Annual Review Calendar Year 2023
<input type="radio"/>	<a href="#">UW - Annual Review Calendar Year 2024 Master DO NOT USE</a> Annual Review Calendar Year 2024
<input type="radio"/>	<a href="#">Annual Review GOALS ONLY 2025</a> Annual Review GOALS ONLY 2025
<input type="radio"/>	<a href="#">UW - Annual Review Calendar Year 2025 Master</a> Annual Review Calendar Year 2025
<input type="radio"/>	<a href="#">Annual Review GOALS ONLY 2026</a> Annual Review GOALS ONLY 2026
<input type="radio"/>	<a href="#">Academic Affairs - Annual Review DONOT USE</a> Annual Review 2018
<input type="radio"/>	<a href="#">AA - Annual Review Calendar Year 2025 (Provost's Office)</a> Annual Review Calendar Year 2025 for Provost's Office





Will the candidate be involved in this evaluation? \*

This setting cannot be changed after this step. [Learn more about candidate involvement.](#)

- ☒ Yes, the candidate will be involved during the case.
- ☐ No

Would you like to notify the candidates now? \*



An automatic notification will be sent to the candidate after the case is created with instructions for uploading and submitting materials online.

- ☐ Yes
- ☒ No

# Review and Settings



CREATE 1 CASE

PREVIOUS

CANCEL

On this page you can look over the case(s) one last time before creating. Make sure everything looks correct, then scroll down to view the Settings.

If you would like your candidate(s) to receive an email notification that their case is ready, select Yes.

Click Create Case at the bottom to create your case(s) and notify your candidates if desired.





# Need Assistance?

If you have any questions regarding the process, please reach out to us at **[facultyaffairs@uwyo.edu](mailto:facultyaffairs@uwyo.edu)**.



UNIVERSITY  
OF WYOMING

Office of  
Academic Affairs