Integrated Innovation Institute
Silicon Valley School Catalog
2024-25 Academic Year
August 26, 2024 – June 30, 2025

Carnegie Mellon University
Integrated Innovation Institute
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Branch Campus: Carnegie Mellon University - Silicon Valley
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Approval to operate means compliance with state standards as set forth in the California Private Postsecondary Education Act of 2009**.**

Any questions a student may have regarding this catalog that have not been satisfactorily answered by the institution may be directed to the Bureau for Private Postsecondary Education at 1747 N. Market Blvd, Ste 225,

Sacramento, CA 95834, www.bppe.ca.gov, toll-free telephone number (888) 370-7589 or by fax (916) 263-1897.

As a prospective student, you are encouraged to review this catalog prior to signing an enrollment agreement. You are also encouraged to review the School Performance Fact Sheet, which must be provided to you prior to signing an enrollment agreement.

A student or any member of the public may file a complaint about this institution with the Bureau for Private Postsecondary Education by calling (888) 370-7589 toll-free or by completing a complaint form, which can be obtained on the bureau's internet website, at www.bppe.ca.gov

CIP Codes: US Department of Education regulations as of July 1, 2011, require the institution to identity programs by Classification of Instructional Programs (CIP) Code, with links to the US Department of Labor/Employment and Training Administration's Occupational Information network. For more information for CIP codes please visit web site at www.nces.ed.gov/ipeds/cipcode.

SOC Codes: NACCAS accrediting agency policies as of July 1, 2011, require the institution to identify programs by Standard Occupational Classification (SOC) Codes. The SOC system is used by Federal statistical agencies to classify workers into occupational categories. . For more information regarding SOC codes please visit internet web site at www. Bls.gov/SOC/. Also visit at http://www.onecenter.org/overview.html regarding occupational title for course of study.

Program	CIP	SOC	
MSSM	14.0903	11-9041	Architectural and Engineering Managers
		15-1243	Database Architects
		15-1252	Software Developers
		15-1253	Software Quality Assurance Analysts and Testers
		25-1032	Engineering Teachers, Postsecondary

Carnegie Mellon University – Mission Statement
To create a transformative educational experience for students focused on deep disciplinary knowledge; problem-solving; leadership, communication and interpersonal skills; and personal health and well-being.

To cultivate a transformative university community committed to (a) attracting and retaining diverse, world-class talent; (b) creating a collaborative environment open to the free exchange of ideas, where research, creativity, innovation and

entrepreneurship can flourish; and (c) ensuring individuals can achieve their full potential.

To impact society in a transformative way - regionally, nationally and globally - by engaging with partners outside the traditional borders of the university campus.

Integrated Innovation Institute – Educational Program Objectives

Master of Science in Software Management

- Identify and develop opportunities for software product innovation in support of the needs of individuals, organizations, and society.
- Formulate and execute a software project management strategy to deliver high-quality products and services.
- Collaborate in a multidisciplinary team environment in the context of a software-intensive project.
- Communicate effectively with a variety of stakeholders through written, spoken and visual communication methods.

CLASS LOCATION

Classes offered for the Master of Science in Software Management (MS-SM) program in California are held at:

Branch Campus:
Carnegie Mellon University - Silicon Valley
NASA AMES RESEARCH PARK, MS 23-11
Moffett Field, CA 94035
Phone: (650) 335-2886; Fax (650) 603-7032
www.cmu.edu/silicon-valley/

CMU-SILICON VALLEY FACITILIES

The Silicon Valley campus is located in the historic Shenandoah Plaza on the NASA Ames Research Park. We occupy Building 23: a 20,111 sq. ft. two-story historic building and is our administrative and teaching building. It houses our academic space: 5 classrooms, 31 faculty and staff offices, 6 conference rooms, 2 kitchen/break rooms, 1 cafe lounge, and 1 multi-function lounge & event space.

Student Lounges: There are several spaces for students in Silicon Valley to use. The main student lounges can be found in B23, downstairs Room 129, upstairs Room 227, & in B24, in CMIL (the Carnegie Mellon Innovations Lounge).

Printers: Printers are for use in Building 23 (B23) Room 123 and the hallway in B23 outside of 109/110. Instructions for adding printers and policies are posted next to each printer.

Library Resources

Library and Resources CMU-SV does not operate a library on campus, but we do have specialized library resources available for students, faculty, and staff. Resources include:

1. Interlibrary Loan
2. e-book developments
3. University Libraries Quick Links

Through the Interlibrary loan, students can request books, articles from journals and conferences, technical reports, or other materials to be sent to you. The materials may be from Carnegie Mellon libraries in the U.S. or other institutions worldwide. Electronic delivery for many articles is available. ILLiad is the system that our students use to request these items. What ILLiad can be used for:

- To request to borrow a book, a tech report, a thesis, copy of an article, etc.
- Check status of requests
- Edit requests
- Cancel requests
- Update your contact information or delivery preferences
- Request to renew an interlibrary loan

The ILLiad link can be found at https://illiad.library.cmu.edu/illiad/illiad.dll.

The first time you use the link you need to provide information about yourself. You only need to do this once. When completing the form, choose these options:

- For **Mailing Address**, state: **Silicon Valley campus**
- For **Delivery Location**, state: **E&S Library**

Ebook developments can be found on our website at http://guides.library.cmu.edu/svc.

See below for an example of ebook developments:
We're building quite a collection of digital resources of interest to the Silicon Valley Campus. An eye-opening list is below:

- AccessEngineering

  This is a "reference tool for professionals, academics, and students that provides seamless access to the world's best-known, most-used collection of authoritative, regularly updated engineering reference information. *AccessEngineering* also comprises dynamic online features, such as instructional, faculty made videos, calculators, interactive tables and charts, as well as personalization tools allowing users to organize crucial project information as they work." *AccessEngineering* includes the well-known Schaum's Outline series of books.

- Knovel

A digital collection of science and engineering reference books. Carnegie Mellon Users Only (including Silicon Valley Campus). Our access to their new collection on Computer Hardware Engineering is now available! You'll also find the books listed in CAMEO - our online catalog.

- Synthesis Digital Library of Engineering and Computer Science

"The basic component of the library is a 50- to 100-page 'Lecture'; a self-contained electronic book that synthesizes an important research or development topic, authored by an expert contributor to the field." You'll also find the books listed in CAMEO - our online catalog.

- Springer e-Books Collection for Computer Science

Thousands of computer science e-books from the publisher

- Springer e-Book Collection for Engineering

Thousands of engineering e-books from the publisher

- Springer e-Book Collection for Mathematics & Statistics

Thousands of mathematics e-books from the publisher

- Plus - General e-Book Collecting from Many Different Publishers

Since we have students, staff, and faculty in Pittsburgh, Qatar, Africa, and Silicon Valley, we're making a concerted effort to collect whatever e-Books we can so that all of our community can use them. You'll find them in CAMEO - our online catalog!

University Quick Links can also be found on the website at http://guides.library.cmu.edu/svc.

Here are examples of some quick links below:

- Articles & Databases

Alphabetical and subject listings of our available databases.

- Cybersecurity

- e-Journals A to Z List

Our automated (partially) method of finding e-Journals that we have access to - even if buried in a full-text database.

- ECE Library Guide

Library research guide for Electrical & Computer Engineering

- Off-Campus / Wireless Access

EZ Proxy single sign on added as an option

- University Libraries Home Page

Our home page has links to the simple and advanced search functions for CAMEO - our online catalog.

For additional questions regarding library resources, please contact Matt Marsteller, Associate Dean for Faculty/Principal Librarian at matthewm@andrew.cmu.edu or by phone: 412-268-7212

OFFICIAL ACADEMIC CALENDAR
The official academic calendar for Carnegie Mellon University can be viewed here: https://www.cmu.edu/hub/calendar/index.html

PROGRAMS OFFERED
The Integrated Innovation Institute offers one degree in connection with the Carnegie Mellon University - Silicon Valley campus.

Master of Science in Software Management: teaches students how to create innovative software products and services, manage the resources to create them, and gain the business expertise that is required for a successful software enterprise. The curriculum is currently offered through two full-time tracks (12 months or 16 months) and a part-time option. This degree is offered completely from the Carnegie Mellon University - Silicon Valley campus.

For detailed outline of the requirements for completion for this program offered at the Integrated Innovation Institute, including a description of the instruction provided in each of the courses, the requirements for completion of each program, including required courses, any final tests or examinations, any required internships or externships, and the total number of credit hours, clock hours, or other increments required for completion can be found online at:

Master of Science in Software Management
- Overview – Full & Part Time Programs: https://www.cmu.edu/iii/degrees/mssm/index.html
- Curriculum: https://www.cmu.edu/iii/degrees/mssm/curriculum.html
- Example Job Classifications for Graduates: https://www.cmu.edu/iii/degrees/admissions/bppe/mssm_jobclassification.pdf

MSSM 16 Months, MSSM 12 Months, & MSSM Part-Time

Full-Time Status

Full-time degree requirements for the MSSM 16- and 12-month curriculum are outlined below. Full-time students must attend courses and complete the degree on campus. Some courses may be offered during evening hours. Degree unit requirements are outlined below. All students are required to maintain full-

time status at 48 units per semester as set by the degree requirements. If a student is permitted to overload courses one semester for individual academic progress, the 48-unit requirement still applies in subsequent semesters.

Part-Time Status

Students registered below 36 units are considered part-time. Students can complete the program part-time in two years (six academic semesters, including summer terms). Part-time students typically take 24 unites of course in a semester. Part-time classes are typically offered in the evenings. If schedule permits, day-time courses could be considered by academic advisor recommendation.

Curriculum of Study for MSSM Full-Time 12-Month Degree

Fall Term

Required Course Units: 48 units
49-760 – Foundations of Software Management – 12 units
49-754 – Integrated Thinking for Innovation – 6 units
49-774 – Product Management – 6 units
49-755 – Product Discovery & Definition – 6 units
49-786 – Software Engineering Management – 6 units
Restricted Elective (placement at New Student Orientation) – 12 units

Recommended/Optional Professional Development Course(s):
These courses may be taken in addition to the maximum 48 units.
49-794 – Strategies for your Software Industry Career – 3 units

Spring Term

Required Course Units: 48 units
Maximum Course Units: 60 units

49-771 – Software Methods & Project Planning – 12 units
49-756 – Product & Business Modeling – 6 units
49-763 - The Business of Software – 6 units
49-757 – Solution Strategy & Marketing – 6 units
49-770 – Software Metrics – 6 units
Elective Requirement – 12 units of approved electives

Summer Term

Required Course Units: 48 units
Maximum Course Units: 60 units

49-804 – Leadership & Teams – 6 units
Elective Requirement – 42 units of approved electives

Curriculum of Study for MSSM Full-Time 16-Month Degree

Fall Term #1

Required Course Units: 48 units
49-760 – Foundations of Software Management – 12 units
49-754 – Integrated Thinking for Innovation – 6 units
49-774 – Product Management – 6 units
49-755 – Product Discovery & Definition – 6 units
49-786 – Software Engineering Management – 6 units
Restricted Elective (placement at New Student Orientation) – 12 units

Recommended/Optional Professional Development Course(s):
These courses may be taken in addition to the maximum 48 units.
49-794 – Strategies for your Software Industry Career – 3 units

Spring Term

Required Course Units: 48 units
Maximum Course Units: 60 units

49-771 – Software Methods & Project Planning – 12 units
49-756 – Product & Business Modeling – 6 units
49-763 - The Business of Software – 6 units
49-757 – Solution Strategy & Marketing – 6 units
49-770 – Software Metrics – 6 units
Elective Requirement – 12 units of approved electives

Summer Term

Required Course Units: 3 units
49-793 - Practical Training in Software Management – 3 units

Students completing an internship may also take 12 units of coursework during summer term. Students are responsible for the additional tuition costs during summer term. Additionally, students must maintain full-time student status during subsequent semesters.

Fall Term #2

Required Course Units: 48 units

Maximum Course Units: 60 units

Required Courses
49-804 – Leadership & Teams – 6 units

Applied Learning Requirement – Complete One of the Following:
49-792 - Software Management Practicum – 12 units
49-808 - Integrated Innovation for Large Scale Problems – 12 units
49-881 – Start-Up Creation in Practice – 12 units

Elective Courses:
30 units of approved electives

Curriculum of Study for MSSM Part-Time Degree

Fall Term #1

Required Course Units: 24 units
49-760 – Foundations of Software Management – 12 units
49-774 – Product Management – 6 units
49-786 – Software Engineering Management – 6 units

Spring Term #1

Required Course Units: 24 units
49-771 – Software Methods & Project Planning – 12 units
49-770 – Software Metrics – 6 units
Elective Requirement – 6 units of approved electives

Summer Term #1

Required Course Units: 24 units
24 units of approved electives

Fall Term #2

Required Course Units: 24 units
49-754 – Integrated Thinking for Innovation – 6 units
49-755 – Product Discovery & Definition – 6 units
Elective Requirement – 12 units of approved electives

Spring Term #2

Required Course Units: 24 units
49-756 – Product & Business Modeling – 6 units

49-763 - The Business of Software – 6 units
49-757 – Solution Strategy & Marketing – 6 units
Elective Requirement – 6 units of approved electives

Summer Term #2

Required Course Units: 24 units
49-804 – Leadership & Teams – 6 units
18 units of approved electives

Required Degree Units

Students must complete a minimum of 144 units and successfully complete all required courses to be eligible for graduation. The average grade of 144 units applied to the degree shall be at least a B (3.0 QPA). Individual course grades below a C (2.0 QPA) are considered unsatisfactory for the degree requirement.

Integrated Innovation Institute - Course Descriptions

49-760, Foundations of Software Management - 12 units
Students apply classic frameworks to research a public company that is currently operating in the software industry. Studying from a variety of perspectives - marketing, strategy, finance, operations - students learn how these companies are organized and how they make decisions. Students also develop practical skills in teamwork, research and professional writing, and presenting to executive audiences.

49-750, Integrated Thinking for Innovation - 6 units
The challenges our world is facing today signal an unprecedented need for innovators who can analyze wicked problems, understand and communicate system dynamics, and work effectively with stakeholders from multiple industries to generate viable solution pathways. Humanity's toughest problems require us to employ a multi-disciplinary approach and to develop a growth mindset to embrace new ways of thinking and working. Innovators need to learn how to take a holistic approach, understand a problem from multiple perspectives, and learn how to empathize with stakeholders.

In this studio course, students practice modeling complex problem landscapes, and engage in critical thinking through process retrospectives, and peer- and self-critique of work products. Combining frameworks and tools from several management and design technologies, students develop an integrated toolkit to guide intelligent problem exploration and framing.

49-751, Product Management - 6 units
Product Management plays an important role in a technology company. It is the organizational function responsible for guiding the strategic direction, development, and delivery of a product or set of products throughout its lifecycle, ensuring it meets both customer needs and business objectives. This course introduces graduate students to the principles and practices of product management. Students will learn how to develop a vision and strategy for a product, how to discover customer needs in order to develop product roadmaps, understand constraints that drive backlogs, align with corporate and competitive requirements, and make data-driven decisions to bring a product to market. The course will focus on hands-on exercises, case studies, and real-world examples to provide students with a comprehensive understanding of product management in the software industry. Guest speakers will share real-world best practices and the latest techniques.

49-755, Product Discovery & Definition - 6 units
Students select a meaningful business or social problem that can be improved in part by software technologies. Students develop a comprehensive description of the important dimentions of that problem by applying a variety of techniques. Students elicit and model customer requirements, perform an analysis of related products and services, and write a compelling vision of problem resolution. Students create a professional product description document that summarizes their analysis and provides several solution alternatives for the business or social problem they intend to improve.

49-772, Software Engineering Management - 6 units
In this course, you will learn the software engineering paradigms that are widely adopted in modern software industry. You will be introduced to the Generative AI augmented Software Development Life Cycles (SDLC) and its supporting process and tools in each stage. Through course long projects, you will gain firsthand experience on best practices in the art of software engineering management. You will be able to build AI-based software prototypes through iterative process of requirements definition, architecture design, implementation, integration, testing, and measurement.

49-771, Process & Project Management - 12 units
Students learn about existing philosophies and methods surrounding software development and study the dimensions of effective management for software projects. Working in teams, students define an optimal software development and project management approach for a given software project context by identifying an appropriate set of practices from Agile, Lean, and other industry proven approaches which are tailored to the project's specific needs. Students develop project estimates and multilevel plans based on their approach. Professional writing and presentation skills are emphasized.

49-756, Product & Business Models - 6 units
Students learn how to capture value from an innovation, converting new ideas to economic value. Students apply the tools of business modeling, including opportunity validation, value proposition, market identification, revenue generation and positioning. Students generate an appropriate business model to address the business or social problem they intend to improve.

49-758, The Business of Software - 6 units
The Business of Software course focuses on the processes and economics of bringing software products and services to market, emphasizing sales, delivery, and funding strategies. BSW focuses on the financial aspects of product development and go-to-market plans. An introduction to current operating models used by software-based businesses is used to evaluate whether a product idea or service concept has the potential to be a successful business and does it have funding potential.

49-757, Solution Strategy & Marketing - 6 units
Students learn how to commercialize a product in the dynamic high-tech industry. Students apply concepts of effective strategy for product delivery, including understanding the drivers for a strategic roadmap, creating scenarios for alternatives, market and technology analysis, and establishing metrics for business success. Students define a strategy and roadmap for delivering a minimum viable product to address the business or social problem they intend to improve.

49-770, Metrics for Technology Products & Services - 6 units
This course provides an introduction to common software technology and business metrics, tools, and processes. Skillfully created metrics, based on collected data, provide insights that enable effective product and service choices to be made. Metrics also answer questions to inform management decisions. Students learn to apply a goal-question-metric (GQM) model to design effective measurement proposals. Principles of change management are used to create a metrics program adoption strategy.

49-761, Leadership & Teams - 6 units
This course explores the dimensions of leadership and teams in the context of the challenges experienced by today's organizations, including the implications of the future of work. The topics covered in the course explore how leaders evolve throughout their careers and develop styles, versatility, and the ability to relate to others in meaningful and impactful ways. Leaders are studied on how they address work complexity and the value they place on teams and individuals. The materials covered in the course also address the significant need to lead teams, change, and culture as organizations become more automated and digital and as virtual workspaces become the norm. Employee engagement and

collaboration are explored from a systemic perspective and their impact on innovation and growth. Additionally, teams and their evolution are systematically considered to enable leaders to learn how to form and develop teams into high-performing and self-organizing creative entities.

49-767, Organizational Behavior for the High-Tech Knowledge Industry - 6 units
This course is about "organizational behavior" for high tech knowledge workers. Organizations are essentially human institutions. They are created by people, populated by people, managed by people, developed by people and operated by people. Understanding the fundamentals of human behavior is crucial for success. But people need to be grouped together and "organized" in order to make things happen, often under tight time and budgetary constraints. This course will focus on high tech organizational design and team effectivenessin other words, on the "execution" capability of a knowledge enterprise. Specifically, we will discuss how to organize a team, a business unit, or a company (including start-ups) that are operating in dynamic, global high tech ecosystems. The focus is on agility, flexibility, and the capacity to adapt to new business realities or crisis situations. High tech companies need innovative capabilities, entrepreneurial approaches, cross-silo collaboration, and resilient dispositions. A major challenge is to devise collaborative teams & organizational structures capable of making "sudden turns" and accommodating changing realities.

49-802, Innovation & Entrepreneurship - 12 units
This course focuses on entrepreneurship and innovation from the vantage point of high-tech companies in Silicon Valley. We explore these topics in the context of the Creation Phase - focusing on founding a new start-up and raising seed funding; and the Scaling Phase - focusing on growing a venture where startups typically undergo "B", and "C" rounds of funding. We examine common mistakes and misconceptions in starting a new entrepreneurial business, and meet entrepreneurs, angel investors, and venture capitalists from Silicon Valley to learn, first hand, the challenges of conceiving, creating, and growing a new venture. In the second part of the course, we focus on the Consolidation Phase - when growing ventures evolve into established global corporations. We examine critical pain points facing this group of companies, the impact of organizational complexity, the challenge of managing a multi-business enterprise, and expanding the global footprint. In this phase technology companies find it more challenging to innovate and often shift their growth focus to searching for acquisitions. Invited guests share their experiences and lessons learned, and give a first-hand perspective on the realities facing this critical group of innovative companies.

49-787, Architecture & Programming Principles - 12 units

Software products are becoming increasingly large and complex, and the responsibility of Software Product Managers has extended beyond core product functionality into non-functional aspects like cloud platform selection, scale and reliability decisions, interoperability with other products, and future extensibility considerations. For this, they rely heavily on their development team to architect and design products that are reliable, scalable, flexible, cost-effective and "future-proof." They are surprised when the product fails to met these expectations - discovered only when the rubber meets the road - often too late to make any fundamental changes. These failures may manifest themselves in the inability of a product to scale the next million users, to integrate with other software systems, to support an international user base, or to enable sales through channels. This course aims to get product managers technically savvy about the non-functional aspects of a software system, and enable them to be influential in the architecture and design phase of product development. It will review a variety of architectures archetypes and analyze them for relevance to specific business requirements. It will also review some well-known products and explore their architectural characteristics. Students will architect and implement a software product using the principles learned in the course. Most coding will be done in Python, JavaScript and HTML. This course is designed for students with some experience in programming but who need to get a handle on architecture-level technical concepts.

49-759, Integrated Innovation for Large-Scale Problems - 12 units
This studio course focuses on team-based innovation across design, business, and engineering with the potential for large-scale impact. Students will take on a complex social problem, and methodically come up with unexpected ideas and opportunities to tackle and solve it. The semester will consist of a series of three modules where students will research the problem in its current form as well as its future manifestation, formulate a desired future state for the problem, and develop viable interventions that lead to a desired future. Students will work both individually and collaboratively, and will learn and apply systems thinking, design thinking, and futures studies to propose appropriate products, services, and policies. Students will seek the support industry experts and community stakeholders in the problem space, and will learn to co-create approaches to solving a complex social problem. Students must be accepted into this course before being able to register.

49-782, User-Centered Research Methods for Product Innovation - 6 units
Building great products and services begins with having a deep knowledge of the problem you are solving and the people for whom you are designing. From controlled lab studies to field research, a/b testing to participatory design, learn a host of Human-Computer Interaction research methods and analysis techniques to get you the right insights and on the path to crafting innovative ideas. We will cover a host of qualitative and quantitative user experience

research methods including interviewing, qualitative data analysis, survey design and analysis and usability testing.

49-780, Human Computer Interaction & User Experience - 6 units
An introduction to the field of Human Computer Interaction. The user interface and experience of a system, to a large measure, is perceived by the user as 'the system'. Innate human capabilities are discussed to understand how to make appropriate decision in designing user interfaces.

49-781, Introduction to Machine Learning - 6 units
The landscape of software products has changed over the last decade with the advent of data science as an interdisciplinary field, and its broad and deep applicability has created opportunities for delivering interesting and innovative capabilities based on deep understanding of data. This course helps current and future product managers understand the distinction between data-driven and conventional products and learn to identify new product capabilities made possible by quantitative data analysis and modeling. Regular hands-on exercises will expose them to techniques for analyzing data, developing insights, building models, and turning the outcomes from models into end-user value. The course project will require students to go through the life cycle of a data-product and showcase their insight as a product feature. Some class sessions in this course will be offered using a Flipped Classroom model where lectures will be distributed as videos for viewing offline, and class sessions are dedicated to clarifications, content review, and course assignments.

49-783, Introduction to Cloud Computing - 6 units
This class is designed to familiarize you with the state of the art in cloud computing and big data analysis. This course is suitable for both students on a technical track (engineering, science) as well as those on a management track who are passionate about big data powered products. You will study basic types of clouds, widely-used cloud computing systems and their strength and weakness, core concepts and technologies on distributed data storage, distributed processes and services, security practices, popular Big Data Analysis algorithms and machine learning use cases on cloud. You will acquire deeper understanding via both case studies from industry big players as well as a project-based hands-on application build and deployment on cloud (no technical pre-requisite).

After completing the course students will be able to:
* Build a basic product on two well-known cloud systems
* Make architectural decisions on choosing the right cloud type, core technologies and services
* Make business decisions on cloud vendors and the right level of investment on cloud
* Critique some current industry cloud-based solutions

49-788, Introduction to IoT - 6 units
This course provides an overview of Internet of Things (IoT), especially focusing on software layer of building mobile applications to capture and process data generated by IoT devices and providing analytical insights. Students will access health and fitness information, motion data, explore home automation technologies and beyond. Through this course, students will understand and appreciate why information technology is entering the era of digital transformation from pure Internet to IoT.

49-789, Architecture Principles for Product Managers - 6 units
Software products are becoming increasingly large and complex, and the responsibility of Software Product Managers has extended beyond core product functionality into non-functional aspects like cloud platform selection, scale and reliability decisions, interoperability with other products, and future extensibility considerations. For this, they rely heavily on their development team to architect and design products that are reliable, scalable, flexible, cost-effective and "future-proof." They are surprised when the product fails to meet these expectations, often too late to make any fundamental changes. These failures may manifest themselves in the inability of a product to scale the next million users, to integrate with other software systems, to support an international user base or to be sold through channels. This course aims to get product managers technically savvy about the non-functional aspects of a software system and enable them to be influential in the architectural and design phases. It will review a variety of architectural archetypes and analyze them for relevance to specific business requirements. It will also review some well-known products and explore their architectural characteristics. As part of the course, students will conceptually architect a product and debate its pros and cons. This course is designed for students who have some experience with product management and can relate to the challenges addressed in it. No experience with coding is necessary. This is offered as a synchronous-online course with a flipped classroom. Lectures are distributed as videos ahead of the class session. Class sessions are focused on clarification, content review, assignment review/feedback, and any collaborative work.

49-792, Software Management Practicum - 12 units
The practicum course involves application of MSSM program concepts in an actual business environment. Acting as consultants to one or more customers, student teams must scope a project; develop a project plan and detailed statement of work. Practicum topics are typically proposed by outside companies, which are looking to work with our students, but there are other options available as well. Students must demonstrate all deliverables to the customer(s), whose assessment of the work is a major component of the grade.

More than a simple internship, the practicum involves real responsibility, teamwork, accountability, and rigor. Students must follow the process for practicum participation outlined in the summer before being able to register into the course.

49-793, Integrated Innovation Institute Internship - SV - 6 units
This course is for 16-month MSSM students who are pursuing an internship. Satisfying the requirements of this course may be done in several ways: by working on-site at a designated company location (i.e. traditional internship), through a sponsored project (applied or research), or through a self-designed team project (requires approval.) Students plan and track their weekly activities, dialog with peers about their experiences, and submit a final paper reflecting on their summer project and how it relates to their career goals. Special permission is required to enroll; eligible students should contact their academic advisor. This course is only offered during the summer.

49-794, Strategies for Your Industry Career - 3 units
This course is designed for graduate students who are searching for an internship or job in industry, including those seeking to make a career shift within the high-tech industries. The course begins with self-assessment and aptitude activities. Students will discover careers available in today's industry by conducting research and listening to guest speakers (including alumni) who discuss roles, skills and prerequisites for career success. Students develop an understanding of the wide variety of companies operating in the high-tech space, and the various technical and management jobs available within them. Students learn how they can apply their skills to product and services companies. The outcomes for students include a personal brand statement that articulates skills valued by employers, discovery of their work preferences and aptitudes, a list of target companies to engage, and a plan to develop the materials (e.g. resume, interview preparation) required to conduct a successful job or internship search based on their new awareness and understanding of specific opportunities they wish to pursue.
Note: This course has no Distance Education Section available for MSSM Remote Part-Time students.

49-784, Artificial Intelligence for Product Managers - 6 units
The principles and practices around artificial intelligence (AI) is increasingly critical to unlock the value of data, and transform business and ultimately human experience. It is so pervasive today that we use it daily probably without knowing it. This course will present students AI business case studies, the most popular AI techniques, algorithms, application recipes, best practices, and offer hands-on experience in implementing them to solve real-world problems. This course covers the spectrum of real-world AI implementations from natural language processing, speech recognition, facial recognition, landmark detection, and social network analysis to technical depth of popular algorithms, neural

network backpropagation methods, probabilistic and non-probabilistic methods. Students will accumulate firsthand experience on Google and Microsoft AI platforms, AI model design and training. This course is designed with the easy-to-follow approach by showing the step-by-step implementation of the core technologies. It presents recipes in major use cases to offer students a leap start on building AI solutions. With the willing-to-learn attitude, students with either technical or business background will succeed in this course.

49-765, Special Topics: Next Gen CIO - 6 units
Today, every enterprise is driven by software, due to the combined impact of COVID, remote work and digital transformation. The role of the CIO is now elevated as tech tools have become the backbone of every business. The strategic significance of this role is now mission critical. The CIO is the point person for managing cloud infrastructure, data, software, supply chains, customer interaction, cybersecurity and innovation. In this course we will:

A. Examine how the role of the CIO is evolving.
B. Learn from seasoned and new CIO's how they are becoming strategic players in the enterprise.
C. Explore future career opportunities in the CIO ecosystem.

49-766, Agile Marketing for High Tech Innovation - 6 units
Agile Marketing for High-Tech Innovations will cover how to formulate marketing strategies that lead to successful products. It will include how marketing strategies are adapted for high tech innovations and products including addressing strategic market planning, functional expectations and tactical considerations when using marketing tools. Topics include: strategic market planning, market orientation, types of alliances needed for moving from innovation to product acceptance, understanding high-tech customers, product distribution options, technology/product management considerations for marketing effectively, pricing, marketing communications, breakthrough versus incremental innovation marketing and measuring marketing effectiveness.

49-801, Venture Governance: Boards, Executive Decision-Making, and Communications - 6 units
The goal of the course is to teach founders of a high tech startup venture the requirements and process to be a director and how to manage their Board of Directors and Advisory Boards. The boardroom is where the governance of the venture occurs. The course will propose frameworks for understanding the complex dynamics among directors, executives, investors and shareholders. The key elements of the work boards do includes: strategic reviews, selecting, evaluating and compensating CEOs and other senior executives, company re-organizations, new director selection, managing top executive succession and dealing with various corporate crises. The role of the Boards is crucial in the value creation phase of a technology ventures trajectory. Conceptual

frameworks will be taught to effectively manage this crucial aspect of a ventures governance in real time. This course will cover the following topics: board participation and voting rights, Board of Directors responsibilities and liabilities, advisory board mentoring duties and shareholding vesting, managing Board of Directors, Directors and Officers Insurance and Compensation of Board Members, Board of Directors role during venture scaling, fundraising, firing & hiring CEOs and company officers, board members role during the Merger and Acquisitions transaction and during IPOs, and joining other boards.
Note: This course has no Distance Education Section available for MSSM Remote Part-Time students.

49-803, Legal Issues in New Venture Creation - 6 units
A critical part of creating a new venture is to provide the legal structure for both compliance and to prepare the venture for future success. For startups the legal profile of the company sets up the framework for growth. The course will cover basic legal requirements of incorporation, and additional options that need to be determined by the founders including equity distribution, board structure, employee stock option vesting, triggers for contingencies such as firing or acquisition and other issues. Another critical legal issue for both startups and established enterprises surrounds protecting intellectual property to immunize the companys strategic advantage as it gains velocity in the global market and encounters competition. Students will learn about various Intellectual Property tools and strategies to protect their product innovations and to understand the competitive marketplace, both in the US and globally.
Note: This course has no Distance Education Section available for MSSM Remote Part-Time students.

49-800, Start Up Creation in Practice - 6 units
For students with the goal of creating a new start up. This course is similar to an independent study, but is focused specifically on new venture creation. Students work on developing their technology-focused idea into a potentially viable company. Students can work individually or with a team including other students. Students must submit a proposal before being accepted into the course and each student (or team) must have an approved faculty advisor.
Note: This course has no Distance Education Section available for MSSM Remote Part-Time students.

49-779, Artificial Intelligence Applications - 6 units
Artificial Intelligence (AI) is a collection of multiple technologies that enable machines to sense, comprehend, act, and learn, either on their own or to augment human activities. AI has introduced new sources of growth, changing how work is done and reinforcing the role of people to drive growth in business, in every sector that matters. This Applied AI course offers students the knowledge of fundamental AI concepts, analysis of a variety of industrial applications, and the opportunities to have close-door discussions with the

leaders in the AI industry. The course focuses on AI introduction and the analysis of popular applications. Prerequisites of data science courses are not required. The objectives of this course are to provide students the ability to analyze why and how AI applications can impact a variety of industries, such as Self-driving, Healthcare, IOT, and explore opportunities and challenges through "real-world" case studies and projects.

49-786, Special Topics: Developing Blockchain Products - 6 units
In this course, future product managers will explore blockchain's transformative potential in their business domain. The course helps them understand blockchain's distributed and decentralized nature, cryptographic security, consensus mechanisms, tokenization, and immutability. In doing so, students will learn to discover the relevance of these characteristics to their own business domain, and identify new capabilities made possible by blockchain-enabled integrity and trust. To help them in the process, students will examine real-world applications in fields such as finance, supply chain, and healthcare.

49-785, Special Topics: Leading Change for Digital Transformation - 6 units
Digital Transformation is among the most critical initiatives that every enterprise is undertaking today. These initiatives are driven by the need to reach higher levels of process efficiency and significantly improve employee and customer experience. At the epicenter of this transformation are AI, sophisticated platforms with multiple interconnected applications, and the drive for highly capable ecosystems. To be adopted appropriately, technologies developed in digital transformations require significant human change for internal personnel and customers alike. Technology leaders can greatly benefit from understanding the methodologies and processes involved in human change to make technology easier to use and formulate the best means to implement and support it. This course will explore the common changes needed by users of technology in digital transformation initiatives. Further, it will introduce the change management methodologies and processes to lead to successful technology adoption. Assignments in this course will enable technology leaders to practice the change methodologies and gain enough knowledge to start applying them in their digital transformation efforts.

49-769, Special Topics: Principles of Enterprise Flexibility - 6 units
The software business is a story of innovation, adaptation, and evolution. Many of these startups and large enterprises alike, are based in Silicon Valley's Darwinian ecosystem, where waves of change are hyper-accelerated. Today this is illustrated by the explosion of GenAI which is driving the next innovation cycle. Building on over 20 years of research, this course will focus on the Silicon Valley playbook for managing complexity and fluidity, where kaleidoscopic change is a constant. The Super-flexibility framework will be used to describe how effective leaders engage in deliberate adaptation in a continuously morphing context. We

define super-flexibility it as the ability to remain consistent by withstanding turbulence, while simultaneously adapting to better fit with this morphing environment. This course will focus on:

A. The super-flexibility playbook for thriving in dynamic ecosystems.
B. Case examples from leading tech companies and innovators
C. Concrete tools and practices that bridge the knowing-doing gap

Carnegie Mellon University - Schedule of Classes
https://enr-apps.as.cmu.edu/open/SOC/SOCServlet/search

Student Affairs & Career Services Resources

Student Affairs:
Students on the Silicon Valley campus can meet with the Assistant Dean of Student Affairs, Lauren Schachar, for on-site connection to various student services resources. These resources include questions regarding public transportation, health, personal concerns, student organizations, activities and general campus information. Lauren Schachar's office is located in B23 Room 217A, and can be reached by phone at 650-335-2844 or email at lauren.schachar@sv.cmu.edu.

Public Transportation:
Students are given a VTA clipper card (Smart Pass) during orientation, which provides them with free access to the local VTA bus system and the local light rail. If students live near a Caltrain station or require Caltrain to get to school or work, they can apply for a Caltrain Go Pass at the Student Affairs office, located in Building 23, Room 215B.

Health/Personal Concerns:
The Assistant Dean of Student Affairs is the point person for any student who is in distress or experiencing a crisis. Student Affairs consults with CMU's Counseling and Psychological Services (CaPS) in Pittsburgh to support students in these circumstances. The director also works closely with CaPS to provide training for SV faculty on identifying and supporting students in distress.

To further promote student access to physical and mental health services, the campus contracted with One Medical to provide students with local, timely access to health care. All students, staff, and faculty are now provided with a membership to One Medical, which provides same

day and next day appointments at any of their locations. There are three main locations near the SV campus. The company also provides 24/7 support via their mobile app, including video consultations with a doctor. All full time students are also required to have health insurance. CMU's student health insurance department helps students to enroll, waive (if they have insurance that meets the university requirements) and navigate and use insurance.

Student Organizations and Activities:
Students are encouraged to join student organizations during orientation and welcome week by requesting information (through an online form) and meeting the student organizations on campus. The online form is provided during the Action lab at new student orientation and can also be found on our website at http://sv.cmu.edu/student-services/student-organizations.html.

Student activities are promoted through a weekly CMU-SV Student Newsletter sent by the Assistant Dean of Student Affairs, Lauren Schachar. Students can find out about opportunities, events and activities through the newsletter, the student events calendar (which they can access once they have their school google accounts set up) and through the digital displays and posters on campus.

Career Services: The Career and Professional Development Services Center (CPDC) serves to provide students with guidance during their job and internship searches. The services available to students include resume reviews, mock interviewing, salary negotiation, career exploration consultation, internship and job consultation, workshops/events and employer relations. The CPDC is also heavily involved in organizing campus-wide job fairs and bringing employers to campus.
Handshake is Carnegie Mellon's online recruiting system. Through Handshake, employers can request accounts to post jobs, request interviews and information sessions, and review student resumes.

Students and alumni can apply to positions, sign up for interviews and find contact information for thousands of recruiters. Handshake can be accessed through the CPDC website.

Students in Silicon Valley can meet with Associate Director of Career Services Leigh Mason. Appointments can be made through Handshake. Career Consultants hold open office hours, which are communicated at the beginning of each semester.

Job Search Guidelines:
Departments strives to play a supportive role in the career pursuits of students, but maintains academics as a priority. It is not acceptable for students to skip classes or assignments in order to attend job interviews. Students should conduct job searched in a manner that does not impede the academic progress through their graduate program. It is also important for students to have an understanding of how to conduct a job search. When applying for jobs, students are expected to exhibit certain ethical behavior, such as arriving on time for interviews, being truthful about their qualifications, and to honor their agreements with recruiters. Further, students should not continue looking and interviewing for a position after they have accepted an offer. The CPDC reserves the right to limit access for any users that do not follow their ethical job/internship search policy. Students who do not follow such guidelines may forfeit their on campus interviewing and/or resume submission privileges.

Student Grievances:
Grievances can be brought directly to the Assistant Dean of Student Affairs or the Director of Student Affairs. For students who wish to submit a concern online, they can do so at the online Student Suggestions Box at http://goo.gl/forms/BySlZMoB6txYDKz02.

Integrated Innovation Institute - Graduate Student Handbook

Please review the link below for more information on degree requirements, student services, career services/placement resource and student achievements for graduation.
https://www.cmu.edu/iii/current-students/pdfs/2023-2024-handbook_on-campus.pdf

FACULTY

2024-2025 Integrated Innovation Institute Faculty Members

Anglin, Deana
Adjunct Professor

- Doctor of Philosophy (PhD) in Human-Centered Computing
  Georgia Institute of Technology
- Master of Science in Human-Computer Interaction (IT)
  Rochester Institute of Technology
- Bachelor's in Computer Science, Math & Spanish
  Lawrence University

Bio
Dr. Deana Anglin is a Senior User Experience Researcher at Google with over 10 years of experience doing user-centered design research. As a designer of global products and services, Deana is most often found in-field learning about people across Asia, Africa, Europe and North America. Her work informs product strategy and innovation in new markets, most notably Google's food and home services delivery platform launched in India last year. She is also a UX mentor to emerging-market startups in Google's Launchpad accelerator program.
Deana received a PhD in Computing from Georgia Tech where she focused on design at the margins - designing with and for the refugee and immigrant community. Her research landed her several prestigious

fellowships and awards from companies like Intel and Google. Her work is published at top venues such as CHI, Ubicomp and IFIP.

Areas of Expertise
Technology Design for International and/or Emerging Markets, Service Design, Social computing, Mobile computing, Information and Communications for Development (ICTD)

Dai, Xueying (Lake)
Adjunct Professor

- Master of Business Administration (MBA)
  University of Southern California, Marshall School of Business
- Bachelor of Science in Economics
  Beijing International Studies University

https://www.linkedin.com/in/lakedai/

Bio
Lake Dai is an entrepreneur, venture capitalist, and a partner at the venture capital firm, LDV Partners. Here at Carnegie Mellon, she is an adjunct faculty at our Silicon Valley campus, teaching students of our Software Management program.

For 20 years, Lake has led product and engineering teams globally at Alibaba, Apple, Yahoo!, and Overture. She is a recognized expert in Search Engine, Ad Platform, Marketplace, Analytics, and Mobile Platforms and Applications, holding several U.S. patents in search algorithm, search tokenization, mobile data analytics, and mobile monetization.

In China, Lake was employee #84 at Alibaba, launching the first generation of profitable marketplace and travel products. At Yahoo!

China, her team launched the first generation of web and vertical search products, tripling Yahoo!'s market share within one quarter.

In the U.S., as a co-founder Shinect, a non-profit acceleration program designed to connect Silicon Valley's entrepreneurs to China's market, she has been helping companies build successful products and profitable businesses. She also mentors start-ups at various incubators including 500 Startups, Muckerlab, Lab360 and Shinect.

Lake is on the Advisory Board of Women In Technology International (WITI), the premiere global organization empowering women in business and technology. She is also a Board Governor and Chairwoman of the US Chapter of QianChengHui, a non-profit organization which fosters entrepreneurship for Alibaba alumni worldwide.

Evans, John Stuart
Distinguished Service Professor

- Doctor of Philosophy (PhD) in Technology Policy
  Aston University
- Master of Science in Operations Research
  Aston University
- Visiting Scholar at the Graduate School of Business
  Stanford University

https://www.linkedin.com/in/stuart-evans-58857125

Bio
Dr. Stuart Evans is a board member, educator, author, and expert on dynamic high-tech ventures. As a Distinguished Service Professor, he shares his expertise by teaching related coursework for our degree programs in Silicon Valley including the M.S. in Software Management. Additionally, Stuart is the Director of the CMU-Emirates iLab, a

partnership between III and Emirates Airlines for innovative education and research specialized for the airline industry.

Stuart's professional career spans across many areas of entrepreneurship, featuring extensive experience within the tech ecosystem of Silicon Valley. He has conducted research for SRI International and Stanford Graduate School of Business; consulted with Bain and Company; worked in investing for Sand Hill Venture Group; and served as executive management for
Shugart Corporation, a Xerox subsidiary. Prior to his time in Silicon Valley, he taught at The Cambridge University's Judge Business School.

In addition to his experience in academia and industry, Stuart has published widely on high-tech ventures. His latest book, Super-Flexibility for Knowledge Enterprises, puts forward a practical toolkit for dynamic adaptation in high-tech ecosystems. The book is based on 28+ years of collective field research and practical experience in Silicon Valley of both Stuart and his co-author Homa Bahrami, a professor of the University of California at Berkeley's Haas School of Business.

Areas of Expertise
High-Tech Entrepreneurship & Innovation, Dynamic Start-up Strategies, Venture Financing

Fang, Fang (Catherine)
Instructor of Integrated Innovation

- Doctor of Philosophy (PhD) in Computer Engineering
  Northwestern Polytechnic University
- Master of Science in Software Management
  Carnegie Mellon University
- Bachelor of Science in Information Management
  Peking University

https://www.linkedin.com/in/catherine-fang-008849/

Bio
Catherine Fang is an entrepreneurial product leader who is passionate about building intelligent software products powering both social networking at large-scale and enterprise platforms. She has 18 years of product management, go-to-market strategy, and software development/architect experience managing products with globally distributed resources (U.S., UK, Hungary, India, China, Japan, Brazil, etc). Catherine specializes in areas including: machine learning-based social network content recommendations, global digital audience targeting strategy for content marketing and advertising, and audience look-alike modeling.

In addition to her role at the Integrated Innovation Institute, Catherine works as a Senior Product Manager for LinkedIn and is the co-founder and CEO of ECAdvisor, an educational platform for software product strategy consulting and personalized recommendations. Previously, she has worked in software and product roles at companies including Yahoo, BlueKai (acquired by Oracle), Sun Microsystem, and Stratify.

Areas of Expertise
Product Management, Go-to-Market Strategy, Software Development/Architecture

Kirmayer, Matt
Adjunct Professor

- Juris Doctor
  Rutgers University School of Law
- Master of Laws
  New York University School of Law

- Bachelor of Arts
  State University of New York at Albany

https://www.linkedin.com/in/mkirmayer/

Bio
Matt Kirmayer represents emerging technology companies and the investors who fund them across a range of industries, including software, educational technology, digital media, social media, artificial intelligence systems and life sciences. Active in the technology and investment communities in Silicon Valley and the East Coast, Matt often works with emerging companies as their outside general counsel, managing legal, financial and operational issues, from formation and angel and capital investment through to exit, that arise when entrepreneurs enter the marketplace.

Matt has more than 25 years of experience in the emerging company and venture capital ecosystem, including numerous seed and venture financings for technology and life science companies. Matt also has a background in guiding clients in securities offerings and mergers and acquisitions.

As part of his commitment to gender equality, Matt sits on the advisory board of Astia, which is a nonprofit organization that invests in companies with women in positions of equity and influence. Matt is a mentor at the Lester Center for Entrepreneurship at the Haas School of Business at the University of California Berkeley and a Sky Advisor to SkyDeck, the unique accelerator at UC Berkeley.

Areas of Expertise
Corporate Law, Venture Capital

Ott, Adrian

Adjunct Professor

- Master of Business Administrative (MBA), Harvard Business School
  Carnegie Mellon University
- Bachelor of Science
  University of California, Berkeley

Bio

Adrian Ott is an award-winning entrepreneur, author, and former senior-level tech executive with a proven track record for visionary business strategies that result in exponential revenue. She has led billion-dollar high technology organizations and assisted innovative ventures to identify and commercialize new product opportunity. *Consulting Magazine* called her "One of Silicon Valley's most respected strategists." As CEO and founder of a technology services business in 2001, Harvard Business School and NAWBO recognized her as one of the most inspiring leaders in Silicon Valley.

In addition to teaching technology venture classes at Carnegie Mellon Silicon Valley, she serves on the National Faculty for the NSF Innovation Corps (National Science Foundation I-Corps). As a National Adjunct, she assists cohorts of promising technology entrepreneurs to commercialize innovations they have developed at top U.S. universities. She has also served in fiduciary and advisory board roles at private for-profit corporations.

Adrian is the award-winning author of two business books that won Best Business Book of the year accolades. She has contributed thought-leading articles to Fast Company, Harvard Business Review and has been featured in national business television, radio, and publications such as Forbes on the latest trends.

Prior to founding her own company, she was an HP executive for 15 years serving in functions such as product management, new ventures,

strategic alliances, marketing, and software development. She was recognized in an annual report for "infusing HP with new revenue streams, new technologies, and new business models."

Areas of Expertise
Commercializing Technology, Go-To-Market Strategy and Business Models, Venture Management/Governance, Strategic Alliances

Mercier, Gladys
Program Director, M.S. Software Management

- Master of Business Administration (MBA)
  Carnegie Mellon University
- Master of Software Engineering
  Carnegie Mellon University
- Bachelor of Science in Computer Science
  University of Pittsburgh

https://www.linkedin.com/in/gmmercier/

Bio
Gladys M. Mercier has 12 years of software engineering experience with a focus on industrial automation systems for steel manufacturing. She has been a certified professional project manager (PMP) since 2002 and has served in a variety of roles throughout her career, including analyst, developer, designer, architect, tester, trainer, and team lead. Gladys joined Carnegie Mellon in Silicon Valley in 2003 and has played an instrumental role in the growth and success of the M.S. in Software Management (MSSM) program.

In addition to her role as MSSM's Program Director, Gladys teaches related coursework as a faculty member and is the academic advisor for

both the MSSM program as well as the Information Networking Institute's MSIT-SM program.
Gladys grew up in Sacramento, California and attended college in Boston and Pittsburgh, PA. After earning her undergraduate at the University of Pittsburgh, Gladys launched her software career in the city's steel manufacturing industry. Her work allowed her to travel extensively, installing systems in many cities in the U.S. and Brazil.

Gladys has been a part of the Carnegie Mellon community for nearly 20 years. After earning her master's degree at CMU, Gladys developed and taught a project management course for Heinz College. When she moved back to California, she continued her CMU career by joining the Silicon Valley campus.

Gladys spends her free time both outside and on the ice. She studies landscape architecture, urban design, and California native plants. Her favorite pastime is playing ice hockey, traveling across the U.S. as part of winning teams and leagues. After living in Pittsburgh for 16 years (and during the Mario Lemieux era), Gladys continues to be a devoted Pittsburgh Penguins fan, despite the cheers of her San Jose Sharks-loving neighbors.

Areas of Expertise
Project Management, Software Engineering, Teamwork, Interpersonal Skills

Miller, David
Adjunct Professor

- Master of Science in Information Technology
  Carnegie Mellon University
- Bachelor of Science in Accounting
  Syracuse University

Bio
David Miller is an entrepreneur, a product team leader, an advisor and educator. David works with F500 companies as well as VC backed start ups to help find the elusive product market fit and build and manage teams of product managers, designers and developers.

Throughout his career, David has worked with companies big and small to bring game changing products to life. David has consulted or worked for companies including Comcast, Oracle, Nextel, Sprint, Prudential, GMAC Commercial Mortgage, SEI Investments, and Cushman & Wakefield. He personally founded three companies in the ad-tech, payment processing, and ride sharing industries.

Currently, with AgileEngine, an award-winning product development firm, David helps companies accelerate and hone their product development. By building hi performing on-shore/off-shore teams, David helps companies move faster and more efficiently to launch and maintain products, reduce backlogs, build integrations, scale and gain market share.

David's focus areas include product management leadership, mentorship, organizational design and conversations that focus on how to unlock creative potential. Also, how organizations create hi performing teams through an inclusive environment that values and honors respect for differences, humility, difficult dialog, managed conflict, hard decision making, resilience, empathy and risk-taking to meet the grand challenges of tomorrow.

Areas of Expertise
Entrepreneurship, Product Development, Product Management, Hi Performing Teams, Corporate Innovation

Mohan, Shantha
Executive in Residence, iLab

- Doctor of Philosophy (PhD) in Operations Management
  Tepper Business School (GSIA), Carnegie Mellon University
- Bachelor of Engineering in Electronics and Communication Engineering
  College of Engineering, Guindy (CEG), Chennai, India

https://www.linkedin.com/in/shanthamohan/

Bio
In her current role as Executive In Residence at the Integrated Innovation Institute, Shantha co-delivers courses, contributes to curriculum design, and mentors students in their projects and practicums.

Shantha is a senior software engineering leader and entrepreneur, with proven track record of growing and mentoring technical teams and generating ROI for customers across the globe. Retail Solutions Inc., the company she co-founded, is a leader in Retail Analytics in the Consumer Packaged Goods domain. She ran product development for the company and was responsible for scaling the product development team across the world and deliver multiple analytic applications. Prior to Retail Solutions, she has over 20 years of experience focusing on mission-critical systems to support semiconductor and other high value added manufacturing. At Consilium, now part of Applied Materials, she managed development of three generations of Manufacturing Execution Systems. Such software systems are mission critical, highly scalable, and highly available systems, and companies such as Intel and Infineon depend upon them for their manufacturing.

Outside CMU, she mentors startups and provides career advice in Product Management and software development careers. Her book "Roots and Wings – Inspiring stories of Indian Engineering Women" is forthcoming.

Areas of Expertise
Software Enterprises, Entrepreneurship, Product Management, Global software development

Morey, Timothy
Adjunct Instructor

- Master of Business Administration (MBA)
  Hass School of Business, University of California Berkeley
- M. Litt/MA Philosophy
  University of Aberdeen

https://www.linkedin.com/in/timothymorey/

Bio
Timothy Morey is a leader in product strategy, innovation and design. Throughout his career, he has worked with public and pre-IPO companies across retail, automotive, consumer, healthcare and technology sectors to bring new products and services to market.

Currently he is the Global Head of Method (www.method.com) a digital product consultancy that is part of GlobalLogic and Hitachi, where he leads a team of 300 engineers, product managers and designers. Prior to joining Method, Tim led frog design, a global creative consultancy.

Tim regularly speaks on innovation, strategy and design and his frameworks have been published in strategy and business publications including Harvard Business Review.

Areas of Expertise
Executive management, Product Strategy, Innovation Management, Design-thinking and human-centered design, Product Management, Creative/digital consultancy management

Prayaga, Shyamala
Adjunct Instructor

- Bachelors of Engineering, Civil Engineering
  Rajiv Gandhi Proudyogiki Vishwavidyalaya

https://www.linkedin.com/in/shyamalaprayaga/

Bio
Shyamala Prayaga is a distinguished Senior Software Product Manager at NVIDIA, where she serves as a driving force behind innovation and creativity in the fields of Conversational AI, Generative AI, Deep Learning, and User Experience (UX). With a career spanning over two decades, Shyamala has solidified her reputation as a visionary leader, speaker, and author in the realm of artificial intelligence and inclusive design. She has not only played key roles at prominent companies but has also ventured into the realm of education as the founder of the Digital Assistant Academy.

Shyamala's career is marked by her dedication to user experience (UX) and voice technology. With over 23 years of experience, she specializes in designing intuitive and user-centric interfaces, contributing to the usability and customer satisfaction of various platforms. Her journey encompasses over ten years of expertise in crafting voice interfaces for Connected Home Experiences, Automotive, and Wearables, showcasing her deep knowledge in the field.

In addition to her practical contributions, Shyamala authored the book "Emotionally Engaged Digital Assistant: Humanizing Design and Technology." The book provides frameworks and principles for implementing trustworthy and emotionally engaging voice interfaces, making it an invaluable resource for those in the field.

Areas of Expertise
User Experience and Design, Human Computer Interaction, Product Design, Product Management, Human-Centered Design, Design Research, Artificial Intelligence

Root, Sheryl
Associate Professor of the Practice

- Master of Business Administration
  Stanford University
- Undergraduate Degree
  University of California

https://www.linkedin.com/in/sheryl-root-703b792/

Bio
Based at CMU Silicon Valley, Sheryl Root an Associate Professor of the Practice for the M.S. in Software Management program. In her role as director and faculty, Sheryl both develops curriculum and teaches courses that merge technology with entrepreneurship.

Outside of CMU, Sheryl is the owner of RootAnalysis, a consulting firm specializing in corporate strategy and marketing. For more than 13 years, Sheryl's firm has worked with C-level Silicon Valley executives at high-tech companies, such as HP-Compaq, Oracle/PeopleSoft, Hyperion, Philips, Novell, and many startup organizations.

Prior to joining academia, Sheryl had an extensive career in the software industry, including a 20-year tenure working for Hewlett-Packard (HP). While at HP, she exceled in a number roles, including Director of Business Strategy, Director of Marketing Operations for Services, Director of the Software Initiative, and Manager of Unix environments. Specializing in the area of software, she led internal teams of consultants for HP operations across the globe, advancing the company's process practices in software engineering and business management.

Sheryl is a leader, board member, and advocate for many world–renowned institutes and organizations. She is Chairman of the Advisory Board for Women in Technology International (WITI), a member of the Board of Advisors for the Stanford Business School Sloan Program, and board member of Netswitch Technology Management. She has coached numerous startups to achieve success in high-tech industries. Additionally, she is a frequent speaker in high-tech subject areas such as agile marketing, strategy, women in STEM, career planning, leadership, new business models, and organizational structures.

Outside of work, Sheryl is an connoisseur of wines and previously owned her own vineyard. In a previous life, she used to race cars.

Areas of Expertise
Business Models & Strategy, Leadership, Agile Marketing, Product Management, Team Dynamics

Saadati, Omid
Adjunct Professor

- Master of Science in Software Management
  Carnegie Mellon University
- Bachelor of Science in Computer Science
  The University of Utah
- Bachelor of Science in Civil Engineering

Baha'i Institute for Higher Education

https://www.linkedin.com/in/omidsaadati/

Bio
Omid Saadati is an accomplished entrepreneur, product leader and technologist with over a decade of experience in developing strategies and leading organizations. Omid's expertise lies in building and scaling developer platforms across various sectors including ad-tech, commerce, and cloud-based networking. He has had key positions at industry-leading companies such as Google, Meta, and Cisco.

Currently, Omid leverages his extensive experience to advise high-potential startups and mentors early-career individuals in the technology sector. He also serves as the chief product officer for an AI-based startup operating in the national security and open source intelligence (OSINT) domain.

Omid's core competencies encompass areas identifying product-market-fit, formulating go-to-market strategies, and managing products. His industry focus includes ad-tech, commerce, and developer platforms. His strategic insights and leadership have consistently driven growth and innovation in these areas.

Areas of Expertise
Product Management, Product Strategy, Go-to-Market Strategy, Business Model Architecture

Shaikh, Karimulla
Instructor of Integrated Innovation

- Doctor of Philosophy (PhD) ABD, Computer-Aided Engineering & Management

Carnegie Mellon University
- Master of Science in Computer-Aided Engineering
  Indian Institute of Technology, Madras
- Bachelor of Technology
  Indian Institute of Technology, Madras

https://www.linkedin.com/in/karimullashaikh

Bio
Karim has built his career over the last 20 years as a seasoned product development executive at both startups and publicly-traded companies. He currently leads product development at Virtual Power Systems, a startup focused on intelligent software-defined power for data centers. Prior to that, he was Senior Vice President of Product Development at SDL Language Technologies, a global leader in delivering machine translation and translation management systems to Fortune 100 companies. His experience leading product management and software engineering spans a wide range of domains.

While he enjoys getting into the technical guts of scalable and reliable cloud products for enterprises and professionals, Karim is also passionate about building high-performance teams by simplifying people and process interactions.

Areas of Expertise
Cloud Software, Enterprise Product Development, Machine Learning, Solving Large Scale Problems

Taborga, Jorge
Adjunct Professor

- Doctor of Philosophy (PhD) in Organizational Systems
  Saybrook University

- Master of Science in Computer Science
  Texas A&M University
- Bachelor of Science in Computer Science
  Texas A&M University

Bio

Jorge Taborga is an accomplished leader in organizational transformation and growth in high tech, healthcare, and cloud services. Across his career, he has led company-wide strategies; developed numerous hardware and software products, and cloud services; re-engineered company-wide business processes; implemented enterprise-wide IT systems; integrated a large number of company acquisitions; and built and mentored many engineering and IT organizations.

Jorge was recently an Executive Vice President at Omnicell, Inc., where he was responsible for product development of this medical devices company. Prior to this assignment, he was this company's Vice President of Manufacturing, Quality, and Information Technology. Before Omnicell, Jorge delivered management consulting services to large enterprises and startups in the areas of strategic planning, go-to-market strategies, business case development, organizational development, supply chain optimization, and large system implementations. He was the Senior Vice President of Technology Operations at Terraspring and fusionOne, both cloud service startups delivering innovations in cloud storage and infrastructure as a service. Jorge also was Vice President and CIO at Bay Networks. Before that, he was Director of Enabling Technologies for Quantum Corporation, leading the business and systems transformation of that company. Earlier in his career, Jorge held a number of product development and leadership positions with ROLM and IBM

In addition to his role at the Integrated Innovation Institute, Jorge is consulting with high growth companies on team and organizational

adaptability. He is also lecturing Organization Development topics in the US and China.

Areas of Expertise
Hardware and software product development, organizational and team adaptability, organizational behavior, change and transformation, and M&A post-merger integration

Thomas, Ravi
Associate Professor of the Practice

- Doctor of Philosophy (PhD) in Economics
  University of California, Berkeley
- Bachelor of Science in Mathematical Economics & Econometrics
  The London School of Economics & Political Science

https://www.linkedin.com/in/ravi-thomas-8b14a65

Bio
Based at Carnegie Mellon's Silicon Valley campus, Ravi specializes in teaching entrepreneurial and new venture coursework for our M.S. in Software Management program. He also mentors CMU-based startups as the director of VentureBridge program, a program open to CMU students and alumni seeking to launch their own high-tech businesses.

Ravi has held senior-level executive positions at several startups. He co-founded Jareva Technologies and served as CFO and a board member. During his time with Jareva, Ravi engaged in all aspects of the company from its founding as a service business, to its repositioning as a software product company, to its revenue stage and successful exit through an acquisition by Veritas. Prior to founding Jareva, he was the CFO of PostX, a company in the secure messaging arena. As CFO, he was involved in raising over $30 million for PostX and Jareva through venture capitalist

firms including Mayfield, Hummer Winblad, and Labrador. Additionally, Ravi is a Consulting Chief Financial Officer for several startups. Previously, he was CFO of University Associates, LLC (UA LLC). UA LLC was formed by the Regents of the University of California and the FHDA Community Colleges holds the master lease on 77 acres of NASA Research Park at Moffett Field.

Prior to joining his first startup, Ravi was an Assistant Professor at the Fox School of Business at Temple University, where he taught graduate and undergraduate courses in microeconomics, economics of information, and public finance. He has also taught at Swarthmore College and was a Visiting Fellow at the International Monetary Fund.
Areas of Expertise
Entrepreneurship, New Venture Strategy

Additional Information about Integrated Innovation faculty and staff can be found here: https://www.cmu.edu/iii/innovators/index.html

ADMISSIONS INFORMATION
Information about Integrated Innovation Institute's Admissions requirements can be found here: https://www.cmu.edu/iii/degrees/admissions/index.html

Transfer Credits & Articulation Agreements
The Integrated Innovation Institute does not accept transfer credits from other institutions for any of its graduate degree programs. Additionally, the Integrated Innovation Institute does not have any transfer or articulation agreements.

Prior Experiential Learning Credit Policy
The Integrated Innovation Institute does not award credit for prior experiential learning experiences before starting a degree program.

Services to International Students

Carnegie Mellon University does admit students from other countries. The Carnegie Mellon Office of International Education (OIE) provides visa services for F-1 and J-1 international students as required by Department of Homeland Security regulations. These services, and related services such as advising and preparation of required documents, are provided to students at no additional charge.

Carnegie Mellon's Office of International Education (OIE) advises international students and scholars regarding immigration/visa and acculturation issues, issues visa documents with which international students and scholars may apply for US visas. Visa documents are issued, per federal regulations, upon request from students who are admitted to full-time programs and who have sufficient, demonstrated financial resources. OIE complies with federal reporting requirements with respect to students/scholars on CMU visa documents and educates students with respect to their own responsibilities for maintaining legal status in the US.

All F and J students/scholars are required to attend a mandatory Orientation and Immigration Check-In upon arrival to their CMU campus or location. The OIE orientation provides legally-required information regarding maintaining status. For those students who participate in Optional Practical Training (OPT) or Curricular Practical Training (CPT), mandatory information/application sessions are provided. These sessions are presented remotely, as needed, by a Carnegie Mellon OIE Designated School Official (DSO). Individual students who have immigration questions or concerns meet with designated OIE advisor during individual, scheduled advising appointments.

For more information, students may view the website or call OIE:
https://www.cmu.edu/oie/foreign-students/index.html
By phone: 1(412) 268-5231

English Language Proficiency Information
Admission to Carnegie Mellon University graduate programs requires demonstration of completed, relevant undergraduate degree programs, as demonstrated by an original transcript from the degree-granting institution during the admission process. Domestic students who graduate from an accredited college or university in the US have demonstrated their English language facility and skill by their success and graduation from competitive undergraduate US institutions.

TOEFL, IELTS, or Duolingo Requirements
Applicants whose native language (mother tongue) is not English must provide TOEFL, IELTS, or Duolingo scores. The Integrated Innovation Institute requires a minimum score of 95 for IBT (with no sub-score below a 23), a minimum score of 6.5 for IELTS, and a minimum score of 105 for Duolingo

Non-native English speakers may utilize Communications and Language Services Office for additional language support for nonnative English speakers: http://sv.cmu.edu/student-services/communication-language-services.html

Language of Course Instruction
All instruction occurs in English.
NOTICE CONCERNING TRANSFERABILITY OF CREDITS AND CREDENTIALS EARNED AT OUR INSTITUTION

The transferability of units you earn at Carnegie Mellon University is at the complete discretion of the institution to which you may seek to transfer. Acceptance of the degree you earn in the Program is also at the complete discretion of the institution to which you may seek to transfer. If the units or degree that you earn at this institution are not accepted at the institution to which you seek to transfer, you may be required to repeat some or all of your coursework at that institution. For this reason,

you should make certain that your attendance at this institution will meet your educational goals. This may include contacting an institution to which you may seek to transfer after attending Carnegie Mellon University to determine if your credits, or degree will transfer. The Integrated Innovation Institute does not accept transfer credits from other institutions for any of its graduate degree programs.

STUDENT'S RIGHT TO CANCEL (WITHDRAWAL/LEAVES OF ABSENCE)

A student has the right to cancel the student's Enrollment Agreement by either taking a leave of absence from the Program (leaving Carnegie Mellon University temporarily with the firm and stated intention of returning) or by withdrawing from the Program (leaving Carnegie Mellon University with no intention of returning). If the student withdraws or take a leave of absence from Carnegie Mellon University, the student may be eligible for a tuition adjustment or a refund of certain fees (excluding any Application Fee, Registration Fee and Enrollment Deposit).

To cancel the student's Enrollment Agreement and take a leave of absence or withdraw, the student must complete Carnegie Mellon University's Leave of Absence or Withdrawal form, as applicable, and return it to Carnegie Mellon University's Registrar's Office, at 5000 Forbes Ave., Warner Hall A12, Pittsburgh, PA 15213. The Leave of Absence and Withdrawal forms, and additional information about leaves of absence and withdrawal, can be found on Carnegie Mellon University's website at https://www.cmu.edu/hub/registrar/leaves-and-withdrawals/.

If the student notifies Carnegie Mellon University of the student's intent to withdraw or take a leave of absence, the student's official date of withdrawal or leave of absence is the earliest of:

- The date the student began the student's withdrawal or leave of absence process at Carnegie Mellon University;

- The date the student notified the student's home department at Carnegie Mellon University;
- The date the student notified the associate dean of the student's College at Carnegie Mellon University; or
- The date the student notified the Carnegie Mellon University Dean of Student Affairs.

If the student does not notify Carnegie Mellon University of the student's intent to withdraw or take a leave of absence, the student's official date of withdrawal or leave of absence is:

- The midpoint of the relevant semester in which the student withdraws or takes a leave of absence;
- The last date the student attended an academically-related activity such as an exam, tutorial or study group, or the last day the student turned in a class assignment.

REFUND POLICY

A. Refunds in General. Students who withdraw from the Program or take a leave of absence after having paid the current semester's tuition and fees or receiving financial aid are subject to the following refund and repayment policies. No other charges are refundable.

B. Exit Counseling. All borrowers of Federal student loans must complete a Federally mandated exit counseling session when graduating or dropping to less than half-time enrollment status, including by withdrawing or taking a leave of absence. Exit counseling prepares students for repayment. Students must complete an exit counseling session in its entirety, with complete and correct information; otherwise, the student's degree, diploma and official transcripts may be withheld. Information about exit counseling sessions can be found on

Carnegie Mellon University's website at https://www.cmu.edu/sfs/financial-aid/exit-counseling.html.

C. Withdrawals/Leaves On or Before 10th Class Day (during the Cancellation Period). Students who withdraw or take a leave of absence on or before the 10th class day of the relevant semester will receive a refund of 100% of tuition and fees (excluding any Application Fee or Registration Fee and Enrollment Deposit).

D. Withdrawals/Leaves after 10th Class Day (after the Cancellation Period). Students who withdraw or take a leave of absence after the 10th class day of the relevant semester but before completing 60% of the semester will be assessed tuition based on the number of days completed within the semester. This includes calendar days, class and non-class days, from the first day of classes to the last day of final exams. Breaks which last five days or longer, including the preceding and subsequent weekends, are not counted. Thanksgiving and Spring Break are not counted. STRF will be adjusted accordingly with any adjustment of tuition. There is no tuition adjustment after 60% of the semester is completed. There is no refund of University fees after the 10th class day of the relevant semester.

E. Repayment to Lenders/Third Parties. If any portion of refundable tuition and/or fees was paid from the proceeds of a loan or third party, the refund may be sent to the lender, third party or, if appropriate, to the Federal or state agency that guaranteed or reinsured the loan, as required by law and/or Carnegie Mellon University policy. Any amount of the refund in excess of the unpaid balance of the loan shall be first used to repay any student financial aid programs from

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which the student received benefits, in proportion to the amount of the benefits received, and any remaining amount shall be paid to the student.

F. Responsibility for Loan. If the student obtains a loan to pay for an educational program, the student will have the responsibility to repay the full amount of the loan plus interest, less the amount of any refund. If the student has received Federal student financial aid funds, the student is entitled to a refund of moneys not paid from Federal student financial aid program funds. If the student is eligible for a loan guaranteed by the Federal or state government and the student defaults on the loan, both of the following may occur: 1) The Federal or state government or a loan guarantee agency may take action against the student, including applying any income tax refund to which the person is entitled to reduce the balance owed on the loan. 2) The student may not be eligible for any other Federal student financial aid at another institution or other government assistance until the loan is repaid.

PROBATION & DISMISSAL POLICIES

University Policy: http://www.cmu.edu/policies/student-and-student-life/suspension-required-withdrawal-policy.html

Policy Statement

University Suspension is a forced, temporary leave from the university. There are three types of suspension for students that apply to both graduate and undergraduate students:

Academic Suspension is the result of poor academic performance or violation of academic regulations and is imposed by the student's college or academic department (see university and college academic policies). *Disciplinary Suspension* is the result of serious personal misconduct and is imposed by the Office of Student Affairs (see The Word/Student Handbook).

Administrative Suspension is the result of failure to meet university financial obligations or failure to comply with federal, state or local health regulations and is imposed by Enrollment Services. (See Student Accounts Receivable Collection Policy and Procedures for financial obligations. Contact Student Health Services for information about health regulations.)

Suspended students may not:

- register for courses
- attend classes
- live in student or fraternity/sorority housing
- use campus facilities, including athletic facilities, library and computer clusters
- participate in student activities
- be members of student organizations
- have student jobs
  (Note: students on academic suspension may have a summer campus job if they accepted the job before they were suspended.)

Employment

Although suspended students may not hold student jobs, students on academic suspension may, under certain circumstances, have a non-student job with the university; students on disciplinary or administrative suspension may not.

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To have a non-student job, students on academic suspension must receive approval from their associate dean (undergraduate students) or department head (graduate students) to ensure that the job will not violate their suspension terms. Students in violation of this will lose their degree student status, meaning they would have to reapply for admission to Carnegie Mellon through either Undergraduate Admission or the appropriate graduate department.

Transfer Credit
Suspended students may take courses elsewhere; however, they may receive transfer credit only if their college's and department's policies allow this.

Appeals
To appeal any action of this policy, the student may write to the following people:

Academic Suspension - associate dean (undergraduate students) or department head (graduate students);

Disciplinary Suspension - dean of student affairs;

Administrative Suspension - vice president for enrollment, vice president for business and planning, and the dean of student affairs, in consultation with the student's associate dean.

Returning from Suspension
In order to return from a suspension, a student must have the following approval:

Academic Suspension - associate dean (undergraduate students) or department head (graduate students);

Disciplinary Suspension - dean of student affairs;

Administrative Suspension - vice president for campus affairs or his designate.

ATTENDANCE & RESIDENCY POLICIES

Class Attendance

Students are expected to attend all classes outlined in a course syllabus as part of their Integrated Innovation Institute degree. All absences must be approved and arranged with the course professor on an individual basis. Please note that the Integrated Innovation Institute does not support excessive course absences for job interviewing and networking events. Excessive course absences may influence a student's ability to pass a course and/or complete their degree.

LEAVE OF ABSENCE

University Policy: https://www.cmu.edu/policies/student-and-student-life/student-leave.html

Policy Statement

Students must sometimes interrupt their studies for a variety of reasons (financial, academic or personal). Students choosing to take a leave of absence must first contact their department advisor to discuss their plans while on leave to work out any conditions that may be necessary for a smooth return to Carnegie Mellon.

A student may leave Carnegie Mellon by either withdrawing from the university (this means leaving the university with no intention of returning) or by taking a leave of absence (this means leaving the university temporarily, with the firm and stated intention of returning).

A Leave of Absence Form must be completed by all students requesting a leave of absence. A Withdrawal Form must be completed by all students who are withdrawing. Notifying instructors or no longer attending classes does not complete the process. Forms are available on The HUB website. Not completing the leave form results in tuition being charged to midpoint of the semester or the last date the student attended an academically-related activity such as an exam, tutorial or study group, or the last day a student turned in a class assignment.

Students are required to fill out all information on the form, including all comment sections relating to reasons for their leave of absence. After completion of the form, students must take it to their home department and dean's office for appropriate signatures. The process of taking a leave will not be complete until all necessary signatures are on the leave form. Under certain circumstances, students may also need the Dean of Student Affairs to sign off on the leave form. International students who are here on a F1 or J1 visa must consult the Office of International Education for information on possible visa implications prior to going on leave.

Students on leave are not permitted to live in university housing, attend classes or maintain employment as students at Carnegie Mellon while their leave is in effect.

Doctoral candidates in ABD (All But Dissertation) status who wish to take a leave of absence should refer to the Doctoral Student Status policy.

Leaves during the academic semester will take effect as of the date signed by the student's dean. After the Leave of Absence or Withdrawal Form is received by the University's Registrar's Office, it will be reviewed for the appropriate tuition refunds (see Enrollment Services: Tuition and Fees Adjustment Policy) and grade implications. The recording of student

courses and grades for taking a leave in a semester follows the deadlines for semester or mini courses, as follows:

- On or before the university deadline to drop classes with W (withdrawal) grades: all courses or grades are removed.
- After the university deadline to drop classes but before the last day of classes: W (withdrawal) grades will be assigned to all classes. (W grades apply to all undergraduate students, and graduate students in the Carnegie Institute of Technology, the Mellon College of Science or the Tepper School of Business.)
- After the last day of classes: Permanent grades assigned by the instructor will be recorded.

Procedural Steps for Student Leaves can be viewed here: https://www.cmu.edu/hub/registrar/leaves-and-withdrawals/index.html

LOCAL HOUSING

The CMU campus in Silicon Valley does not offer on-campus housing or off-campus housing services. Students need to find their own housing. There are many apartment complexes and/or room rentals within a commutable distance from the campus. Housing costs vary and most students choose to have roommates. View a range of housing prices in the Mountain View area.

While our student affairs office cannot act as a real estate agency or rental broker for you, we are happy to offer our advice or suggestions on locations that may be of interest to you. For questions, please contact the Assistant Dean of Student Affairs at student-services@sv.cmu.edu.

STUDENT RECORD RETENTION POLICY

University Policy: https://www.cmu.edu/es/docs/record-retention-policy.pdf

The policy of Carnegie Mellon University is to ensure the safety, accessibility, confidentiality, and good condition of the permanent record of every Carnegie Mellon student, past and present.

Carnegie Mellon University (CMU), established in 1900, holds all permanent records of our students (current and former) in the University Registrar's Office. We maintain original paper records in an offsite secure climate-controlled underground storage facility along with a microfilmed copy of each record. In addition, a copy of microfilmed records also resides in the University Registrar's Office in Pittsburgh, PA. This includes all students globally, include those students studying at our California teaching location and instructional sites. CMU has established the University Registrar's Office as the official data steward of all student records.

Historical Records 1906-1989
For every student enrolled at Carnegie Mellon University as a new or continuing student prior to the fall semester, 1989, and dating back to 1906, the University Registrar's Office of Carnegie Mellon University maintains a complete permanent record, whether the student is degree-seeking or non-degree seeking, whether enrolled for credit or not within the student's official transcript. The official transcript provides brief personal information to identify the student as unique. It contains courses, units and grades; semester and cumulative grade point averages; all degrees earned; transfer credit or advanced placement and dean's list indications.

The University Registrar's Office has established and maintains within a microfiche copy of good, readable, and reproducible quality of the student's permanent record in a secured records unit. A secondary permanent microfilm copy of all records will be maintained in good

condition in the climate-controlled, fire-proof, limited-access security at an offsite facility.
Modern Records 1989-Current
For every student enrolling at Carnegie Mellon University as a new or continuing student beginning in fall semester, 1989, the University Registrar's Office of Carnegie Mellon University will establish and maintain within an electronic data file in the University Student Services Suite (S3, our student information system) a complete permanent record, whether the student is degree-seeking or non-degree seeking, whether enrolled for credit or not. The University Registrar's Office staff will, under the direction of the University Registrar, add to the electronic record such new information as pertains to the student's demographic and academic record as it becomes available, semester-by-semester, and as the student progresses in his/her career at Carnegie Mellon University.

Daily, the Carnegie Mellon University Computing Services Division will perform a backup of all databases that have been altered during that day. Weekly, the Computing Services Division will perform a complete backup of all records within the student data file. The Computing Services Division staff will store the daily backups in the climate-controlled, fire-proof, limited-access security facility in the Computer Operations center in Cyert Hall on the Carnegie Mellon University campus. Upon successful completion of the monthly backup, the Computing Services Division staff will securely transfer the weekly and monthly backups from the preceding month to climate-controlled, fire-proof, secured vault at an offsite facility.

Cessation of Operations
In the unlikely event that CMU (which has existed for more than 100 years) ceases to exist, it will make appropriate arrangements to comply with clauses (1) and (2) for all its students consistent with the Commonwealth of Pennsylvania statutes and law. I have an informal plan and agreement with the University of Pittsburgh's University Registrar's

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Office, that should either school cease, we would exchange student records.

STUDENT RIGHTS
University Policy: https://www.cmu.edu/policies/student-and-student-life/students-rights.html

Statement
The primary right of students is to pursue their education so long as they maintain their eligibility to remain a member of the community by meeting its academic standards and so long as they observe the regulations imposed by the university for the governance of the academic community.

The second right of students is to be recognized as members of the student body, with all the privileges pursuant thereto as to use of physical plant, university services and facilities.

Every student has the constitutional rights and responsibilities of any citizen under the law. Conversely, a responsibility of any student is to respect these rights of any other member of the university community.

A student has the right to expect that academic and professional processes should be flexible and periodically open to review and to participate constructively with faculty and administration in those processes by which the university community maintains the excellence of the standards of its curriculum and methods of instruction and the viability of its total educational program.

The student has the right to recourse through the procedures outlined in The Word/Student Handbook against unreasonable academic action.

Summary of Graduate Student Appeal and Grievance Procedures
University Policy: https://www.cmu.edu/graduate/policies/appeal-grievance-procedures.html

Introduction
Set forth below is a summary of the processes available to graduate students who seek review of academic and non-academic issues. Generally, graduate students are expected to seek informal resolution of all concerns within the applicable department, unit or program before invoking formal processes. When an informal resolution cannot be reached, however, a graduate student who seeks further review of the matter is to follow these formal procedures. To the extent that these processes are set forth in official University policies, links to those statements of policy and more detailed description of processes and procedures are included. Where a graduate student's concerns implicate multiple policies or processes, the University reserves the right to decide which process shall apply in order to avoid duplicative and potentially conflicting processes and decisions, or in appropriate circumstances, the order in which multiple reviews may occur.

These appeal and grievance procedures shall apply to students in all graduate programs of the University. Students should refer to the online handbooks (or hard copy handbooks if applicable) for their particular programs for more detailed information about the administration and academic policies of the program. To the extent that these policies conflict in any way with policies, processes and procedures adopted at the College, Department or Program level, the policies set forth herein shall govern.

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Appealing Final Grades

Final grades will be changed only in exceptional circumstances and only with the approval of the instructor and the department, unit or program. Grading is a matter of sound discretion of the instructor and final grades are rarely changed without the consent of the instructor who assigned the grade. The following circumstances are the unusual exceptions that may warrant a grade appeal: (a) the final grade assigned for a course is based on manifest error (e.g. a clear error such as arithmetic error in computing a grade or failure to grade one of the answers on an exam), or (b) the faculty or staff member who assigned the grade did so in violation of a University policy. A graduate student who believes a final grade was assigned pursuant to (a) or (b) above should first present the case informally to the faculty or staff member responsible for the course in which the student believes an inappropriate grade has been awarded. If the student is not satisfied with the resolution at this first step, the student shall submit a formal, written appeal, with appropriate documentation, within the first fourteen (14) days of the semester following the awarding of the final grade under challenge, to the head of the department in which the course was offered. The department head (or the program head if the department head chooses to delegate the decision to him/her) will issue a written decision on the appeal within 30 days, or as soon thereafter as practical. If the student is not satisfied with the decision of the department head (or program head), the student may submit a formal, written appeal, with appropriate documentation, within seven (7) days to the Dean of the college in which the course is offered. The Dean shall render a decision within 30 days, or as soon thereafter as practical. The decision of the Dean shall be final and not appealable.

Summary of Levels of Appeal for Final Grades:

- Informal discussion with the faculty member
- Formal written appeal to the department head (or the program head if the department head chooses to delegate the decision to him/her)

- Formal written appeal to the Dean
- Dean issues final non-appealable decision

See also Carnegie Mellon University Grading Policies

Appeal of Academic Actions

An "Academic Action" is an action by a program, unit or department based on a graduate student's academic performance or failure to satisfy academic program requirements. Examples of Academic Actions include, but are not limited to, academic probation, academic suspension, and dismissal/drop. Each college, department, or program may set its own academic requirements and standards for acceptable academic performance. These standards and benchmarks for performance are set forth in the online and/or hard copy handbooks for individual graduate programs.

Graduate students will be notified of an academic action in writing by the applicable department, unit, or program head or director, or designated committee. Graduate students are encouraged to seek informal resolution of any concerns related to academic actions informally within the department, unit or program before filing a formal appeal.

Graduate students who wish to appeal an Academic Action must submit a formal, written appeal, with appropriate documentation, to the Dean of the College within seven (7) calendar days after receipt of written notice of the academic action by the department, unit, or program head or director, or designated committee. The Dean may delegate review of the matter to another individual or committee, including but not limited to one of the Associate Deans, the College Council or a specially constituted grievance committee who shall make a recommendation to the Dean. The Dean shall render a decision on the appeal within thirty (30) days or as soon thereafter as practical.

Graduate students who wish to appeal the written decision of the Dean must submit a formal written appeal, with appropriate documentation, to the Provost within fourteen (14) calendar days after receipt of the Dean's decision. A copy of the appeal must also be submitted to the Assistant Vice Provost for Graduate Education and to the Dean. The Provost may delegate review of the matter to another individual or committee, including but not limited to the Vice Provost for Education who shall make a recommendation to the Provost. The Provost shall render a decision on the appeal within thirty (30) days or as soon thereafter as practical. Decisions by the Provost are final and not appealable.

Generally, sanctions resulting from an Academic Action (e.g. probation, suspension, or dismissal /drop) take effect immediately, regardless of whether an appeal is filed. In exceptional circumstances, however, the appropriate Dean or the Provost may elect to hold sanctions in abeyance pending the resolution of an appeal.

Summary of Levels of Appeal for Academic Actions:

- Seek informal resolution within department, unit, or program
- Formal written appeal to the Dean
- Decision rendered by the Dean
- Formal written appeal to the Provost
- Provost issues final non-appealable decision

Appeal from Academic Disciplinary Actions

"Academic Disciplinary Action" refers to penalties or sanctions imposed for violation of academic policies against cheating, plagiarism or unauthorized assistance as defined by the University's official Policy on Academic Integrity.

The procedures for appeal from an Academic Disciplinary Action are set forth in the University's official policy on Academic Disciplinary Actions for Graduate Students. Graduate students who wish to appeal an

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Academic Disciplinary Action must state in writing to the Provost their intention to do so within seven (7) calendar days after the date on which the penalty is communicated to the student (the "penalty date"), and then must present their written appeal with appropriate documentation to the Provost no later than fourteen (14) calendar days after said penalty date. The Provost will then take action on the appeal. Graduate students who wish to appeal the Provost's decision must state in writing to the President their intention to do so within seven (7) calendar days of the decision of the Provost. For more details, please review the policy and procedures on Academic Disciplinary Actions for Graduate Students.

Generally, sanctions resulting from an Academic Disciplinary Action take effect immediately, regardless of whether an appeal is filed. In exceptional circumstances, however, the appropriate Dean or the Provost may elect to hold sanctions in abeyance pending the resolution of an appeal.

Summary of Levels of Appeal for Academic Disciplinary Actions:

- Academic disciplinary penalty imposed by faculty and/or department
- Formal written appeal to the Provost
  o Provost issues decision
- Formal written appeal to the President (when policy permits)
  o President issues final non-appealable decision

Community Standards Violations

As members of the University community, Carnegie Mellon students are expected to respect the rights of all students, faculty and staff and adhere to the policies outlined in the Student Handbook contained in The Word, the University Policies website, and any applicable college, department or graduate program handbooks.

If a student has observed a violation of university policy or law, or feels harmed by another student's misconduct (e.g. affecting his/her welfare,

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property, safety or security) he/she should file a report with the Dean of Student Affairs and/or University Police as appropriate.

The procedures for adjudicating community standards violations and for appealing the results are available in The Word under Community Standards.

For more information about community standards and disciplinary procedures, please visit the Community Standards website.

Summary of Levels of Appeal for Community Standards Violations:

Harassment
Carnegie Mellon is firmly committed to intellectual honesty, freedom of inquiry and expression and respect for the dignity of each individual. Acts of harassment or intimidation by a student toward any member of the campus community will not be tolerated. Graduate students with concerns or grievances related to harassment or intimidation by another student should contact the Dean of Student Affairs for resolution. Acts of harassment or intimidation by a student may be referred to the University Committee on Discipline.
Graduate Students with concerns or grievances related to alleged harassment or intimidation by a staff member, faculty member or other member of the campus community should contact the University Ombudsman and Assistant Vice President for Diversity and Equal Opportunity Services (412) 268-1018 for resolution.

Sexual Harassment and Sexual Assault
Graduate student grievances or concerns relating to sexual harassment will be handled according to the University's Policy against Sexual Harassment and Sexual Assault. Any member of the university community, whether faculty member, student, or staff member, who believes she or he has been the victim of sexual harassment and/or

sexual assault or is aware of such conduct, is encouraged to make contact with any of the individuals identified in the Policy against Sexual Harassment and Sexual Assault under Resources: People Who Handle Complaints and Oversee Compliance with this Policy and in the appendices. They will make certain that your complaint is communicated to the appropriate resource for handling.

Intellectual Property Disputes
Disputes concerning rights to intellectual property must be resolved according to the procedures set forth in the University's Intellectual Property Policy.

Research Misconduct
Carnegie Mellon University is responsible for the integrity of research conducted at the University. As a community of scholars, in which truth and integrity are fundamental, the University has established procedures for the investigation of allegations of misconduct of research with due care to protect the rights of those accused, those making the allegations, and the University. The procedures for handling allegations of research misconduct are set forth in the Policy for Handling Alleged Misconduct in Research at Carnegie Mellon University.
For graduate students found responsible for research misconduct, the President of the University may impose specific sanctions up to and including expulsion. The imposition of sanctions is subject to the procedures for approval and/or appeal prescribed for community standards violations, available at https://www.cmu.edu/student-affairs/theword/community-standards/index.html

Return from Leave of Absence
Graduate students who wish to return to Carnegie Mellon following a leave of absence must follow the procedures set forth in the Student Return Policy.

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Generally, graduate students must negotiate their return to the University with their home academic department and follow any applicable departmental policies. If a department chooses to deny a student's return from a leave of absence, the student may appeal to the Dean of the College.

Suspension/Required Withdrawal

A University Suspension is a forced, temporary leave from the university. There are three types of suspension for students that apply to both graduate and undergraduate students:

- Academic Suspension is the result of poor academic performance or violation of academic regulations and is imposed by the student's college or academic department (see university and college academic policies).
- Disciplinary Suspension is the result of serious personal misconduct and is imposed by the Dean of Student Affairs (see The Word/Student Handbook).
- Administrative Suspension is the result of failure to meet university financial obligations or failure to comply with federal, state or local health regulations and is imposed by Enrollment Services. (See Student Accounts Receivable Collection Policy and Procedures for financial obligations. Contact Student Health Services for information about health regulations.)

Graduate students who wish to appeal a suspension or required withdrawal may write to the following individuals depending on the type of suspension:

- Academic Suspension – The applicable department, unit, or program head;
- Disciplinary Suspension – Dean of Student Affairs
- Administrative Suspension –Vice President for Enrollment, Vice President for Business and Planning, and the Dean of Student Affairs, in consultation with the student's Associate Dean

For more details see the Student Suspension / Required Withdrawal Policy.

General Grievances

The following grievance procedures are to be used for graduate student problems or concerns that are not covered by any of the policies or procedures set forth above. As such, these grievance procedures may not be used as a substitute for procedures contemplated under any other policy, including but not limited to, policies regarding academic actions; academic disciplinary actions; community standards; harassment; sexual harassment; intellectual property; research misconduct or any other policy.

Graduate students are expected to discuss any concerns or grievances initially with the faculty or staff member(s) involved. Students are strongly encouraged to seek informal resolution of grievances through consultations within the academic unit, department or program. Students may also seek assistance with the informal resolution of a grievance through the designated college ombudsperson or the Assistant Vice Provost for Graduate Education.

If a grievance cannot be resolved informally with the faculty or staff member involved within the academic department, a student may submit a formal, written grievance to the head of the department, unit or program. If there is more than one student with a grievance on a particular matter, each student must submit a separate grievance. The department, unit, or program head, or director or designated committee will issue a written decision on the grievance within thirty (30) days or as soon thereafter as practical.

Graduate students who wish to appeal from the decision rendered at the department, unit or program level must submit a formal, written appeal to the Dean of the College within seven (7) calendar days after receipt of

written notice of the decision by the department, unit, or program head, or director or designated committee. The Dean may delegate review of the matter to another individual or committee, including but not limited to one of the Associate Deans, the College Council or a specially constituted grievance committee who shall make a recommendation to the Dean. The Dean shall render a decision on the appeal within thirty (30) days or as soon thereafter as practical.

Graduate students who wish to appeal the written decision of the Dean must submit a formal written appeal to the Provost within seven (7) calendar days after receipt of the Dean's decision. A copy of the appeal must also be submitted to the Assistant Vice Provost for Graduate Education and to the Dean. The Provost may delegate review of the matter to another individual or committee, including but not limited to the Vice Provost for Education who shall make a recommendation to the Provost. The Provost shall render a decision on the appeal within thirty (30) days or as soon thereafter as practical. Decisions by the Provost are final and not appealable.

Summary of Levels of Appeal for General Grievances:

- Seek informal resolution within department, unit, or program
- Formal review by the appropriate department, unit, or program head, or director or designated committee.
- Formal written appeal to the Dean
- Formal written appeal to the Provost
- Provost issues final non-appealable decision

DEGREE & DIPLOMA DISTRIBUTION PROCESS

Based on the graduating semester, final diplomas are distributed to students through two channels – in person or direct mail. The full outline for this process and timeline for distribution can be reviewed here:

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https://www.cmu.edu/hub/registrar/graduation/diplomas/deadlines-and-distribution.html

COST OF ATTENDANCE

	# of Semesters	Entire Program	First Semester
MSSM (full time-12 month)	*3*	$90,523	$30,387
MSSM (full time- 16 month)	*3*	$96,027	$30,387
MSSM (part time local)	*6*	$93,743	$15,393
MSSM (part time remote)	*6*	$92,705	$15,215

Additional details regarding cost of attendance per degree can viewed here: https://www.cmu.edu/iii/degrees/admissions/cost.html

FINANCIAL ASSISTANCE

There is no university funding provided for students at the Integrated Innovation Institute. Teaching or research assistantships are available to Ph.D. students only. All enrolled students, or their employers, are responsible for payment in full for tuition and expenses. Some students do secure external funding. You are welcome to explore the HUB website for information about graduate student financial aid, the Office of Graduate Education and the College of Engineering websites for external funding opportunities.

Meeting the cost of a graduate education is a significant investment. Carnegie Mellon University is committed to making it financially possible for graduate students to enhance educational development and reach their career goals. There are many financial aid resources available to students pursuing graduate studies at Carnegie Mellon University. Carnegie Mellon University participates in a number of Federal and state financial aid programs. Information about these

financial aid programs can be found on Carnegie Mellon University's website, at http://www.cmu.edu/finaid/index.html

If you obtain a loan to pay for the MS in Software Management, you will have the responsibility to repay the full amount of the loan plus interest, less the amount of any refund. If you have received federal student financial aid funds, you are entitled to a refund of moneys not paid from federal student financial aid program funds.

Carnegie Mellon University does not have a pending petition in bankruptcy, is not operating as a debtor in possession, and has not filed a petition in bankruptcy within the preceding 5 years, nor has Carnegie Mellon had a petition in bankruptcy filed against it within the preceding 5 years that resulted in re-organization under Chapter 11 of the United States Bankruptcy Code.

Information about the Institution:

Descriptions of Academic Programs
Information on the university's graduate academic programs and degree offerings is available from the various schools/colleges and admitting offices. Links to those programs can be found at https://www.cmu.edu/academics/index.html.

Faculty
Information on the university's faculty and instructional personnel is available from individual schools/colleges. This information can be found on the university's academics website at https://www.cmu.edu/academics/index.html.

Student Body Diversity

For Information about the diversity of the university student body, contact the Institutional Research and Analysis Office, https://www.cmu.edu/ira/index.html.

For information about the University's Diversity, Equity and Inclusion initiative, visit the Center for Student Diversity and Inclusion's website at https://www.cmu.edu/student-diversity/.

Gainful Employment Disclosures
As required by U.S. Department of Education regulations Gainful Employment Disclosures (Disclosures about CMU certificate programs that prepare students for specific occupations) can be found at https://www.cmu.edu/hub/consumer-information/.

Health and Safety

Drug and Alcohol Abuse Prevention Program
Under the Drug Free Workplace Act of 1988 and the Drug Free Schools and Campuses Act of 1989, the Carnegie Mellon University is required to have an alcohol and other drug policy outlining prevention, education and intervention efforts and consequences for policy violations. The policy can be found at https://www.cmu.edu/policies/administrative-and-governance/alcohol-and-drug-policy.html.

Vaccination Policies

- CMU-SV Prematriculation Immunization Policy can be found at https://www.sv.cmu.edu/student-services/student-health.html.
- CMU University Health Services Health Requirements for Incoming Students can be found at https://www.cmu.edu/health-services/new-students/.

Safeguarding Educational Equity / Sexual Misconduct Policy

The University prohibits sex-based discrimination, sexual harassment, sexual assault, dating/ domestic violence and stalking. The University also prohibits retaliation against individuals who bring forward such concerns or allegations in good faith. The University's Sexual Misconduct Policy is available athttps://www.cmu.edu/policies/administrative-and-governance/sexual-misconduct/index.html. The University's Policy Against Retaliation is available at https://www.cmu.edu/policies/administrative-and-governance/whistleblower.html. If you have been impacted by any of these issues, you are encouraged to make contact with any of the following resources:

- Office of Title IX Initiatives, https://www.cmu.edu/title-ix/ 412-268-7125, tix@cmu.edu
- University Police, 412-268-2323

OFFICE OF STUDENT ASSISTANCE AND RELIEF

The Office of Student Assistance and Relief is available to support prospective students, current students, or past students of private postsecondary educational institutions in making informed decisions, understanding their rights, and navigating available services and relief options. The office may be reached by calling (888) 370-7589, option #5, or by visiting osar.bppe.gov

STUDENT TUITION RECOVERY FUND

The State of California established the Student Tuition Recovery Fund (STRF) to relieve or mitigate economic loss suffered by a student in an educational program at a qualifying institution, who is or was a California resident while enrolled, or was enrolled in a residency program, if the student enrolled in the institution, prepaid tuition, and suffered an economic loss. Unless relieved of the obligation to do so, you must pay

the state-imposed assessment for the STRF, or it must be paid on your behalf, if you are a student in an educational program, who is a California resident, or are enrolled in a residency program, and prepay all or part of your tuition.

You are not eligible for protection from the STRF and you are not required to pay the STRF assessment, if you are not a California resident, or are not enrolled in a residency program.

It is important that you keep copies of your enrollment agreement, financial aid documents, receipts, or any other information that documents the amount paid to the school. Questions regarding the STRF may be directed to the Bureau for Private Postsecondary Education, 1747 N. Market Blvd, Ste 225, Sacramento, CA 95834, (916) 574-8900 or (888) 370-7589.

To be eligible for STRF, you must be a California resident or are enrolled in a residency program, prepaid tuition, paid or deemed to have paid the STRF assessment, and suffered an economic loss as a result of any of the following:

1. The institution, a location of the institution, or an educational program offered by the institution was closed or discontinued, and you did not choose to participate in a teach-out plan approved by the Bureau or did not complete a chosen teach-out plan approved by the Bureau.
2. You were enrolled at an institution or a location of the institution within the 120 day period before the closure of the institution or location of the institution, or were enrolled in an educational program within the 120 day period before the program was discontinued.
3. You were enrolled at an institution or a location of the institution more than 120 days before the closure of the institution or location of the institution, in an educational program

offered by the institution as to which the Bureau determined there was a significant decline in the quality or value of the program more than 120 days before closure.
4. The institution has been ordered to pay a refund by the Bureau but has failed to do so.
5. The institution has failed to pay or reimburse loan proceeds under a federal student loan program as required by law, or has failed to pay or reimburse proceeds received by the institution in excess of tuition and other costs.
6. You have been awarded restitution, a refund, or other monetary award by an arbitrator or court, based on a violation of this chapter by an institution or representative of an institution, but have been unable to collect the award from the institution.
7. You sought legal counsel that resulted in the cancellation of one or more of your student loans and have an invoice for services rendered and evidence of the cancellation of the student loan or loans.

To qualify for STRF reimbursement, the application must be received within four (4) years from the date of the action or event that made the student eligible for recovery from STRF.

A student whose loan is revived by a loan holder or debt collector after a period of noncollection may, at any time, file a written application for recovery from STRF for the debt that would have otherwise been eligible for recovery. If it has been more than four (4) years since the action or event that made the student eligible, the student must have filed a written application for recovery within the original four (4) year period, unless the period has been extended by another act of law.
However, no claim can be paid to any student without a social security number or a taxpayer identification number.

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Other Information

Section 1: Consumer Information

The Higher Education Opportunity Act (HEOA) was enacted on August 14, 2008, and reauthorized the Higher Education Act of 1965, as amended (HEA). These federal regulations govern the federal Title IV financial aid programs and include several student consumer information disclosure requirements as well as reporting requirements for institutions participating in the federal financial aid programs. This reporting ranges from general information about an institution, to its educational programs and services, to its policies, and student outcomes. Carnegie Mellon makes all required consumer information disclosures readily available, including through our website at https://www.cmu.edu/hub/consumer-information/ and through individual notifications to students when required or upon request.

Additionally, parents and students are welcome to contact Lisa Krieg, Associate Vice President and Director of Enrollment Services, at krieg@andrew.cmu.edu, for questions regarding any reporting area or to request a paper copy of the Student Consumer Information document.

Section 2: Accreditation and Licensing of the Institution

Carnegie Mellon University is accredited through a voluntary, peer-review process coordinated by the Middle States Commission on Higher Education (MSCHE or Middle States). The aim of the accreditation process is to ensure current and future students and the public that the university is providing a high quality educational experience for students.

In the 2017-2018 academic year, a team of external reviewers from peer universities visited CMU to evaluate the university's educational and administrative activities. In preparation for that visit, CMU conducted a formal Self-Study (see https://www.cmu.edu/middlestates/2018-self-study/index.html) that engaged many faculty and staff from all over the university, in Pittsburgh and around the world.

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Faculty and staff composing Self-Study Groups (see https://www.cmu.edu/middlestates/2018-self study/working-groups.html) and the peer evaluation team (see https://www.cmu.edu/middlestates/2018-self-study/peer-evaluation-team.html) often make suggestions or recommendations for improvement of CMU's activities and operations.

Please visit the pages within this site to learn more about accreditation standards and processes and to view the university's reaccreditation reports.

MSCHE is one of six regional accrediting agencies in the United States, each accrediting institutions of higher education within a specific geographic region. Middle States is recognized by the U.S. Department of Education. This recognition enables MSCHE's member institutions to establish eligibility to participate in federal financial aid programs (e.g., federal loans, grants, and work-study) administered by the U.S. Department of Education. Carnegie Mellon University has been accredited by Middle States since 1921.

The address and telephone number for the Middle States Commission on Higher Education is 3624 Market Street, 2nd Floor West, Philadelphia, PA 19104, (267) 284-5000. To contact MSCHE by email, please use info@msche.org or Spanish/Español espanolinfo@msche.org.

The university's current "Statement of Accreditation Status" can be found at, https://www.msche.org/institution/0476/.

Inquiries regarding the University's accreditation status or authorization to operate in any of the above states may be directed to: Associate Vice President/Director of Enrollment Services, Carnegie Mellon University, 5000 Forbes Avenue, Pittsburgh, PA 15213, telephone: 412.268.5399, email: krieg@andrew.cmu.edu.

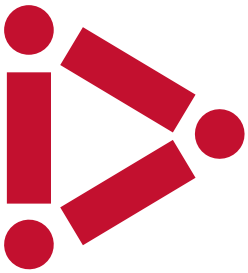
Carnegie Mellon University is licensed to operate in the states listed below. Individuals may contact the relevant agency for more information or information about how to file a complaint.

California
Bureau for Private Postsecondary Education
P.O. Box 980818
West Sacramento, CA 95798-0818
Telephone: 888-370-7589
Email: bppe@dca.ca.gov
Website: www.bppe.ca.gov

New York
New York State Education Department
Office of Higher Education
Room 977 Education Building Annex
Albany, NY 12234
Telephone: 518-486-3633
Email: hedepcom@nysed.gov
Website: www.highered.nysed.gov

Pennsylvania
Pennsylvania Department of Education
Office of Postsecondary and Higher Education
333 Market Street, 12th Floor
Harrisburg, PA 17126-0333
Telephone: 717-783-8228
Email: ra-collunivseminfo@pa.gov
Website: www.education.state.pa.us

Washington, D.C.
Office of the State Superintendent of Education
Government of the District of Columbia



810 First Street NE 9th Floor
Washington, DC 20002
Telephone: 202-727-6436
Email: osse@dc.gov
Website: osse.dc.gov

Section 3: Distance Education, State Authorization and Reciprocity Agreement (SARA)

The State Authorization Reciprocity Agreement (SARA) is an agreement among member states, districts, and territories in the United States, which establishes national standards for interstate offering of postsecondary distance education courses and programs. It is intended to standardize the process of offering online courses and programs by postsecondary institutions located in states other than the state in which the enrolled student(s) are residing. SARA is overseen by a national council (NC-SARA) and administered by four regional education compacts.

Carnegie Mellon University has been approved by the Commonwealth of Pennsylvania to participate in NC-SARA and was accepted as a SARA institution on May 2, 2017; additionally, Carnegie Mellon secured approval through NC-SARA on May 18, 2017. Carnegie Mellon University is listed as an approved, participating institution on the NC-SARA website (http://www.nc-sara.org/). At this time, 49 of the 50 United States are SARA members. California is not a member of SARA; however, Carnegie Mellon is able to offer online education to California residents.

Except where prohibited by applicable law, students who reside outside of the United States generally are not restricted from enrolling in our online programs. Some online programs do require in-person attendance at one of Carnegie Mellon's teaching locations (e.g., Carnegie Mellon's Pittsburgh, Pennsylvania campus) for short portions of the program. Students interested in enrolling in a specific online program are encouraged to contact the person designated by the online program for questions about the program's requirements or enrollment.

Section 4: Student Complaints & Consumer Information by State

Students should first attempt to handle complaints in consultation with their academic department and the university's Vice Provost for Education at vpe@andrew.cmu.edu. Unresolved complaints may be directed to the official complaint agency in the state or U.S. territory in which your state (or U.S. territory) is located. Through the university's participation in the State Authorization Reciprocity Agreement (SARA), you may access contact information for your state agency and instructions for filing complaints in your state using the SARA State Authorization Guide at https://nc-sara.org/guide/state authorization-guide. If your state's complaint process is inadequate, complaints may be directed to the official complaint agency in the state or U.S. territory in which your CMU campus, additional location or other instructional site is.

Section 5: Professional Licensure Disclosures at the State Level

In accordance with Title 34 Code of Federal Regulations Part 668.43(a)(5)(v) regarding information educational institutions must make readily available to enrolled and prospective students, Carnegie Mellon is providing the following professional licensure/certification disclosures:

School of Architecture

The Bachelor of Architecture (B.Arch) and the Master of Architecture (M.Arch) degree programs are National Architecture Accrediting Board (NAAB)-accredited degree programs and meet the *educational requirements* for architectural licensure in all US States and the District of Columbia. Since each state has additional requirements for architectural licensure and those requirements vary among the states, students are advised to review the requirements for architectural licensure of the state in which they intend to obtain their license. The National Council of Architectural Registration Boards (NCARB) website at https://www.ncarb.org/ and individual state architectural licensing board websites are good resources for researching additional architectural licensure requirements by state.

School of Music, Teacher Education Certification

Carnegie Mellon has determined that the Carnegie Mellon K-12 Music Education Certification program meets the *educational requirements* for educator licensure for instrumental, vocal, and general music (K-12) in the public schools of

Pennsylvania, but has not determined whether it meets the educational requirements for educator licensure in other states or the District of Columbia. Students should also be aware that each state also has additional educator licensure requirements and those requirements vary among the states. Students are advised to review the requirements for educator licensure of the state in which they intend to obtain their license prior to starting the academic program. Individual state educator licensing board websites are good resources for researching additional educator licensure requirements by state.

Pennsylvania also participates as a reciprocating state (see https://www.ecs.org/teacher-license-reciprocity-state-profiles/) which allows for educators holding an educator's license in one state to earn a license in another state, subject to meeting specific state specific requirements of the other state. Information about educator licensure in Pennsylvania may be found on the PA Department of Education Website at https://www.education.pa.gov/Educators/Certification/Pages/default.aspx.

College of Engineering, Undergraduate Degree Programs

Carnegie Mellon's engineering programs (Mechanical Engineering, Civil and Environmental Engineering, Chemical Engineering, Materials Science and Engineering, and Electrical and Computer Engineering) are accredited by the Engineering Accreditation Commission of ABET (see https://www.abet.org/). In order to obtain professional engineer licensure in any state, students must graduate from an ABET accredited program and meet testing and/or work experience requirements of the state in which they intend to obtain their license. Students are advised to review the requirements for professional engineer licensure of the state in which they intend to obtain their license. Information about professional engineer licensure in Pennsylvania may be found on the PA Department of State website at https://www.dos.pa.gov/ProfessionalLicensing/BoardsCommissions/EngineersLandSurveyorsandGeologists/Pages/Engineer-Guide.aspx.
The National Society of Professional Engineers website at

https://www.nspe.org/resources/licensure/licensing-boards and individual state professional engineer licensing board websites are good resources for researching additional professional engineer licensure requirements by state.

Section 6: Educational Programs

Undergraduate & Graduate Programs

Carnegie Mellon offers dozens of programs including undergraduate and graduate offerings. A full list of our Schools and Colleges can be found here, https://www.cmu.edu/academics/index.html.

Carnegie Mellon offers a broad range of academic programs that are carefully designed, regularly assessed, and iteratively improved by the faculty in the responsible academic unit(s). Our students' educational experiences are aligned with the University's mission and goals and support our core values as well as our commitment to excellence. We strive to offer an inclusive educational environment where students are supported to grow and thrive while preparing for their professional and personal post-graduate pursuits. The Vice Provost for Education has the responsibility to coordinate efforts, in partnership with the academic deans and associate deans, to assure processes for the development, review, and continuous improvement of all academic programs are in place and regularly conducted at the department, college and university levels. The Vice Provost for Education may be contacted at: vpe@andrew.cmu.edu.

In addition to the link above, please visit our specific undergraduate and graduate websites:

Undergraduate Programs, https://www.cmu.edu/admission/majors-programs

Graduate Programs, https://www.cmu.edu/graduate/academics/guide-to-graduate-degrees and-programs/index.html

Section 7: Study Abroad

A student's enrollment in a program of study abroad approved for credit by Carnegie Mellon may be considered enrollment at CMU for purpose of applying for assistance under Title IV of the Higher Education Act (HEA) as amended. For more information

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about study abroad and Coronavirus FAQs, please visit our website, https://www.cmu.edu/oie/news-and-events/archives/2020-2021/covid/sab and-coronavirus-faq.html.

Section 8: CMU Faculty and Instructional Facilities

Information about faculty and instructional facilities may be found on individual college/school websites via our website, https://www.cmu.edu/academics/.

Section 9: Articulation Agreements

Cross-College and University Registration PCHE (Pittsburgh Council on Higher Education) Guidelines: Full-time Carnegie Mellon students may take courses for credit through the Pittsburgh Council on Higher Education (PCHE). This county-wide consortium of ten accredited member institutions permits the flow of students between institutions based on established protocols and agreements. Questions about Carnegie Mellon University's participation in PCHE may be directed to the University Registrar's Office at uro-pche@andrew.cmu.edu.

Section 10: Written Arrangements

The Written Arrangements document on https://www.cmu.edu/hub/consumer information/docs/written-arrangement.pdf provides information regarding written arrangements between Carnegie Mellon University (CMU) and any institution(s) that provides a portion of a CMU degree program to students enrolled at CMU. CMU enters into such agreements to enrich the educational experiences offered to its students.

Section 11: Student Location Determination

Under the code of federal regulations (CFR) 600.9(c)(2)(iii) regarding state authorization requirements, an educational institution must make a determination regarding the state in which a student is located at the time of the student's initial enrollment in an educational program and, if applicable, upon formal receipt of information from the student, in accordance with the institution's procedures, that the student's location has changed to another state. Students are expected to review and update their off campus residence and their permanent address in Student Information Online (SIO) at the beginning of each academic year and when they change their local and/or permanent

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addresses. For purposes of state authorization requirements, student location will be determined based on information in the Carnegie Mellon Student Information System (S3) in the following order:
1. Student's academic program code and;
2. Student's campus address, or;
3. Student's off-campus residence (if #1 and #2 cannot ascertain location) or;
4. Student's permanent address (if #1, #2, and #3 cannot ascertain location)

Section 12: Computing Services
Information about Computing Services provides technology services as part of the Division of Operations. The Computing Services central IT department provides services that have strategic impact on university goals and may be accessed on our website, https://www.cmu.edu/computing/.

Carnegie Mellon Computing Policy
Carnegie Mellon computing and related policies are available on our website: https://www.cmu.edu/policies/information-technology/computing.html

Section 13: Information Security Office (ISO)
The Information Security Office is responsible for coordinating compliance with state, federal and international laws and regulations dealing with the security of Carnegie Mellon's information resources. This includes partnering with the Office of General Counsel and impacted business units to implement appropriate policies, procedures and controls to maintain compliance with legal requirements. More information is available on the ISO website, https://www.cmu.edu/iso/compliance/index.html.

Section 14: Copyright

Digital Copyright and DMCA
Carnegie Mellon University takes copyright violation seriously. Besides raising awareness about copyright law, it takes appropriate action in support of enforcement as required by policy and law. United States copyright law (see https://www.copyright.gov/) "protects the original works of authorship fixed in any tangible medium of expression, from which they can be perceived,

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reproduced, or otherwise communicated, either directly or with the aid of a machine or device".

Fair Use Policy

The University's Fair Use Policy states that all members of the University must comply with US copyright law and it explains the fair use standards for using and duplicating copyrighted material. In addition, the policy prohibits the duplication of software for multiple uses, meeting the Digital Millennium Copyright Act (DMCA) (see https://www.copyright.gov/legislation/dmca.pdf) requirements. The DMCA criminalizes the development or use of software that enables users to access material that is copyright protected. Furthermore, the Carnegie Mellon University Computing Policy (see https://www.cmu.edu/policies/information-technology/computing.html) prohibits the distribution of copyright protected material via the University network or computer systems, unless the copyright owner grants permission.

Peer to Peer File Sharing

The Higher Education Opportunity Act of 2008 (Public Law 110-315) Section 488, requires institutions of higher education to annually inform students that "unauthorized distribution of copyrighted material, including unauthorized peer-to-peer file sharing,
may subject the students to civil and criminal liabilities". Carnegie Mellon University does this by publication of a news article on Computing Services' website or via mass mail communication each semester. The law goes on to require institutions "to provide a summary of penalties for violation of Federal copyright laws, including disciplinary actions that are taken against students who engage in unauthorized distribution of copyrighted materials using the institution's information system." Copyright protected materials can include, but are not necessarily limited to:

Music
Movies or other videos
Literary works

Software
Digital images or libraries

Penalties and Legal Actions

A user in violation of copyright law may face the following penalties:
o Suspension from the university network as described under The University Processing of a DMCA Notice.
o Prosecution in criminal court or a civil lawsuit seeking damages. Civil liability for copyright infringement can be as high as $150,000 per instance of infringement in addition to legal fees. Criminal penalties for a first offense may be as high as five years in jail and a fine of $500,000.
o Disciplinary action taken by the Human Resources, the Office of General Counsel, or the Office of Community Standards and Integrity depending on the specific affiliation of the alleged infringer.

Additional Information

Additional Information may be found on the following CMU web pages:
https://library.cmu.edu/services/copyright
https://www.cmu.edu/c-cm/
https://www.cmu.edu/computing/

Section 15: Student Activities

Student Affairs

In depth information about CMU Student Affairs, including student activities and organizations, service and civic engagement, student government, diversity and inclusion, and how to get involved on campus is available on the CMU website, https://www.cmu.edu/student-affairs/get-involved/index.html.

SLICE

The office of Student Leadership, Involvement and Civic Engagement (SLICE) website at https://www.cmu.edu/student-affairs/slice/index.html provides opportunities where undergraduate and graduate students can explore,

connect and engage with one another to create a set of experiences that match their unique interests and talents.

The Center for Diversity and Inclusion

Diversity and inclusion have a singular place among the values of Carnegie Mellon University.

The Center for Student Diversity and Inclusion (CSDI) actively cultivates a strong, diverse and inclusive community capable of living out these values and advancing research, creativity, learning and development that changes the world.

The Center offers resources to enhance an inclusive and transformative student experience in dimensions such as access, success, campus climate and intergroup dialogue. Additionally, the Center supports and connects historically underrepresented students and those who are first in their family to attend college in a setting where students' differences and talents are appreciated and reinforced.

More information is available on the CMU website at https://www.cmu.edu/student diversity/.

Section 16: Cost of Attending the University

Information about tuition and fees as well as estimated costs for books, course materials, supplies, and equipment; housing and food; transportation; and personal/miscellaneous expenses are available on the Student Financial Services' website at https://www.cmu.edu/sfs/tuition/index.html.

Section 17: Net Price Calculator

The Net Price Calculator is a tool that is intended for U.S. citizens, eligible non-citizens and permanent residents who plan on pursuing a full-time undergraduate degree but haven't yet applied to the university. This tool is a great way to start a conversation with your family about affordability as you conduct your college search. Carnegie Mellon offers the Net Price Calculator in partnership with the College Board to enable prospective students and their families to estimate financial aid eligibility. Before using

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the calculator, watch our Net Price Calculator tutorial video below for helpful tips. The video as well as other helpful information, are available on our website, https://www.cmu.edu/admission/aid-affordability/net-price-calculator.

Section 18: College Navigator

The College Navigator website is a free consumer information tool designed to help students, parents, and others get information about thousands of U.S. postsecondary institutions--including Carnegie Mellon University--in the Department of Education's National Center for Education Statistics (NCES). College Navigator includes information on graduation and retention rates, academic programs, costs, financial aid, student loan defaults, etc. The College Navigator website is https://nces.ed.gov/collegenavigator/.

Section 19: Facilities & Services for Disabled Students

The Office of Disability Resources provides responsive and reasonable accommodations to students who self-identify as having a disability, including physical, sensory, cognitive and emotional disabilities. Students who want to learn more about the services and accommodations provided by the Office of Disability Resources, may visit https://www.cmu.edu/disability-resources/students/. Students may discuss accommodation needs by emailing access@andrew.cmu.edu or calling 412-268-6121 to set up an appointment.

Students are also welcome to discuss concerns about support for disabilities with members of the admission staff, housing office and/or health/psychological services. Upon enrollment, students with disabilities should contact the Office of Disability Resources to discuss their needs and to develop a Student Individual Accommodation Plan. Accommodations are made with the intent to maintain the academic integrity of each course and the academic program as a whole, while also meeting assessed needs.

Section 20: Student Privacy & FERPA

One of the most significant changes a parent or guardian experiences in sending a student to college is the difference in privacy standards for educational records.

Carnegie Mellon values the student's right to privacy. The university adheres to a federal law called the Family Educational Rights and Privacy Act (also called FERPA or the Buckley Amendment) that sets privacy standards for student educational records and requires institutions to publish a compliance statement, including a statement of related institutional policies. For more detailed information, view the student privacy section of our website at https://www.cmu.edu/hub/privacy/

Section 21: Student Information and Outcomes

The Office of Institutional Analysis and Research (IRandA)

The Office of Institutional Analysis operates under the leadership of the Office of the Vice Provost for Institutional Effectiveness and Planning (see https://www.cmu.edu/iep office/index.html) provides the CMU community with official information for use in external reporting and access to specific university datasets for internal analysis. More information about IRandA is available on our website, https://www.cmu.edu/ira/index.html.

Retention and Graduation Rates

Retention and graduation rates are available on the CMU website, https://www.cmu.edu/ira/degrees-granted/graduation-and-retention-rates-by cohort_11.4.2021.pdf (scroll to bottom).

Enrollment Counts

CMU Enrollment Counts are available on the CMU website, https://www.cmu.edu/ira/Enrollment/index.html.

Integrated Postsecondary Education Data System (IPEDS)

IPEDS gathers information required under the Higher Education Act of 1965 as amended from colleges and institutions who participate in the federal student financial aid programs. This information includes
Information for Carnegie Mellon is available on the IPEDS website:

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Category	Website
General Information	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#general
Tuition, Fees & Estimated Student Expenses	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#expenses
Financial Aid	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#finaid
Net Price	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#netprc
Enrollment	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#enrolmt
Admissions	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#admsns
Retention & Graduation Rates	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#retgrad

Outcome Measures	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#outcome

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Programs/Majors	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#programs
Service Members & Veterans	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#service
Varsity Athletic Teams	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#sports
Accreditation	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#accred
Campus Security and Safety	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#crime
Cohort Default Rates	https://nces.ed.gov/collegenavigator/?q=Carnegie+Mellon&s=all&id=211440#fedloans

Common Data Set

The most recent information about Carnegie Mellon's common data set is available
through our website, https://www.cmu.edu/ira/CDS/cds_2122.html. Common data set includes:

General Information
Enrollment and Persistence (.pdf)
First-Time, First-Year (Freshman) Admission (.pdf)
Transfer Admission (.pdf)
Academic Offerings and Policies (.pdf)
Student Life (.pdf)
Annual Expenses (.pdf)

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Financial Aid (.pdf)
Instructional Faculty and Class Size (.pdf)
Degrees Conferred (.pdf)

Section 22: Career & Job Placement

Career & Job Placement Service

The Career and Professional Development Center (CPDC) is Carnegie Mellon University's centralized career services center providing a comprehensive range of services, programs and materials focusing on career exploration and decision making, professional development, experiential learning and employment assistance to meet today's evolving workplace and student goals of finding satisfying work! Information about the resources provided by CPDC is available on the CMU website, https://www.cmu.edu/career/resource-library/index.html.

First Destination Career Outcomes

The Career and Professional Development Center (CPDC) surveys all students graduating from Carnegie Mellon University (excluding Heinz College and Tepper graduate students) in order to obtain information on their career plans after graduation, also known as **First Destination** Career Outcomes. Common points of data gathered from graduates include hiring companies, graduate and professional schools, starting salaries, and geographic locations. More information may be found on the CMU website, https://www.cmu.edu/career/outcomes/post-grad-dashboard.html.

Section 23: Health and Safety

Annual Security and Fire Safety Report

A copy of the most recent CMU Annual Security and Fire Safety Report is available on the CMU website at https://www.cmu.edu/police/reports/fire-safety/2022asr.pdf. Please see page 14 for Emergency Response and Evacuation Procedures. A printed copy of the report may be requested by contacting University Police at 412-268-6232 or campuspd@andrew.cmu.edu.
Historical annual security and fire safety reports (Carnegie Mellon University Police Department Annual Reports) are also available online at

http://www.cmu.edu/police/annualreports/.

Alcohol and Drug Policy (Faculty, Staff, Students)

The University's Alcohol and Drug Policy, which includes information about health risks associated with drug and alcohol as well as resources for individuals who are experiencing substance use difficulties, is published on https://www.cmu.edu/student-affairs/pdfs/2023-2024-alcohol-and-drug-guide.pdf. The policy focuses on compliance with laws in the United States and the Commonwealth of Pennsylvania. However, as a global university with operations throughout the world, Carnegie Mellon is equally committed to compliance with all applicable alcohol and drug laws in all jurisdictions in which the university operates.

Vaccination Policies

The university values personal and community health and recognizes the critical role that each individual plays in contributing to community health by participating in personal health care practices that prevent the spread of contagious diseases. Participation in a vaccination program represents one such highly effective personal health practice. CMU Prematriculation Immunization Policy is published on http://www.cmu.edu/policies/student-and-student-life/immunizations.html.
COVID vaccine requirements change frequently. The most up-to-date information on COVID vaccination requirements is published on https://www.cmu.edu/coronavirus/health-and-wellness/vaccines.html and https://www.cmu.edu/coronavirus/. Immunization requirements for incoming students are published on https://www.cmu.edu/health-services/new-students/.

Emergency Response Plan

The purpose of the Emergency Response Plan is to establish an organizational structure and procedures for response to major emergencies. It assigns the roles and responsibilities for the implementation of the plan during an emergency following the incident command system model. This plan has been prepared to address all types of emergencies affecting the Carnegie Mellon community in a coordinated and systematic manner. Carnegie Mellon University is committed to supporting the welfare of its students, faculty, staff and visitors. This plan is designed to maximize human

safety and preservation of property, minimize danger, restore normal operations of the university, and assure responsive communication to all appropriate parties. See https://www.cmu.edu/student-affairs/theword/community-policies/emergency response-plan.html#scope for more information.

Section 24: Equity in Athletics

The Equity in Athletics Disclosure Act requires co-educational institutions of postsecondary education that participate in a Title IV, federal student financial assistance program, and have an intercollegiate athletic program, to prepare an annual report to the Department of Education on athletic participation, staffing, and revenues and expenses, by men's and women's teams.

Statute and Regulations

The Higher Education Opportunity Act (Public Law 110-315) (HEOA) was enacted on August 14, 2008. This law reauthorizes and extends the Higher Education Act of 1965, as amended. The Higher Education Act (HEA) provides the statutory authority for most of the programs and activities administered or conducted by the Office of Postsecondary Education, including requirements related to equity in athletics disclosure.

Annual Report

This information is available each November 1 at the U.S. Department of Education's website https://ope.ed.gov/athletics/#. To view the data, please select "Get data for one institution" (usually located on the right side of the page), enter "Carnegie Mellon University" in the "Name of Institution" field, and select the "Search" button at the bottom of the page. Select "Carnegie Mellon University" to view the institution's data.

A printed copy of the university's most recent report is available upon request by calling the Department of Athletics, Physical Education and Recreation at 412-268-8054 or by sending an email to jcentor@andrew.cmu.edu.

Section 25: Textbook Information

Bookstore

Required and recommended textbooks and supplemental course materials are available to purchase from the University Stores. Students can view and purchase their course materials by visiting the online bookstore at https://bncvirtual.com/vb_home.php?FVCUSNO=37983&url=CarnegieMellon.htm. To get started, students can visit the Textbooks FAQ at https://bookstore.web.cmu.edu/SiteText?id=73594 for instructions on using the online bookstore site. The University Stores staff is happy to help with questions and can be reached by email at books@andrew.cmu.edu, by phone at 412-268-5591, or in-store.

Textbook Provisions (Higher Education Opportunity Act 2008)

The Higher Education Opportunities Act (HEOA) of 2008 (see https://www.congress.gov/bill/110th-congress/house-bill/4137) outlines several provisions for publishers and higher education institutions related to textbooks and other course materials. According to the law, the language addressing textbooks is meant to "ensure that students have access to affordable course materials by decreasing costs to students and enhancing transparency and disclosure with respect to the selection, purchase, sale, and use of course materials (Sec. 133 a.)" Textbook consumer information requirements are provided on https://www.cmu.edu/es/course-and-classroom/textbooks.html.

Section 26: Voter Registration

Pennsylvania

o **Pennsylvania Voter Registration** (see https://www.pavoterservices.pa.gov/Pages/VoterRegistrationApplication.aspx)
o **Find Your PA Polling Place** (see https://www.pavoterservices.pa.gov/pages/pollingplaceinfo.aspx)

California

o **California Online Voter Registration** (see https://registertovote.ca.gov/)
o **Find Your CA Polling Place** (see https://www.sos.ca.gov/elections/polling-place)

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New York

o **New York Online Voter Registration** (see https://www.elections.ny.gov/VotingRegister.html)
o **Find Your NY Polling Place** (see https://voterlookup.elections.ny.gov/)

District of Columbia

o **Washington DC Voter Registration** (see https://vote.gov/register/dc/)
o **Find Your DC Polling Place** (see https://www.dcboe.org/Voters/Where-to-Vote/Find-Out Where-to-Vote)

Section 27: Tuition Adjustments/Withdrawals from the University Tuition Adjustments

If a student takes a leave of absence or withdraws within the first ten class days (fifteen calendar days) of a semester, tuition and fees are fully refundable, as indicated on the tuition adjustment schedule (see https://www.cmu.edu/sfs/tuition/adjustment/index.html). Students who take a leave of absence or withdraw from the university before completing 60% of the semester will be assessed tuition based on the number of days completed within the semester. This includes calendar days, class and non-class days, from the first day of classes to the last day of final exams. Breaks that last five days or longer, including the preceding and subsequent weekends, are not counted. Thanksgiving and Spring Break are not counted. There is no tuition adjustment after 60% of the semester is completed.

Official Date of Leave of Absence/Withdrawal

For students who notify the university of their intent to take a leave of absence or withdraw, the official date is the earliest of the:
o Date the student began the withdrawal or leave of absence process;
o Date the student notified his or her home department;
o Date the student notified the associate dean of his or her college; or
o Date the student notified the dean of students.
For students who do not notify the University of their intent to take a leave of absence or withdraw, the official date is:

o The midpoint of the semester;
o The last date the student attended an academic-related activity, such as an exam, tutorial or study group, or the last day a student turned in a class assignment.

Other important Information about tuition adjustments & withdrawals from the University as well as tuition adjustment schedules may be found on the following website: https://www.cmu.edu/sfs/tuition/adjustment/index.html.

Tepper Refund Policy Exception:
Tepper School graduate tuition is refunded 100% to students who withdraw by the course drop deadline. After the course drop deadline, tuition is non-refundable and remains charged at 100%. This tuition refund policy is separate from the calculation used to cancel and return federal loan funds when students withdraw.

Section 28: Transfer of Credit Policy
The University's Transfer of Credit Policy is published on https://www.cmu.edu/policies/student-and student-life/transfer-credit-evaluation-and-assignment.html.

Transfer credit is only accepted for courses taken at accredited institutions from which an official transcript is received. Transfer credits must meet the academic requirements of the program in which the student is enrolled and may not exceed the maximum number of transferrable units, per the program's academic requirements. Courses accepted for credit must have been taken for a letter grade and students must have earned a C (2.00) or above in the transferred course, however, transfer credits will only record the units/credits earned, **not** the grade, unless the course is taken at one of the Cross Registration (PCHE) affiliates. Carnegie Mellon does not award course credit for prior experience such as service in the armed forces, paid or unpaid employment, or other "real world" learning experiences or demonstrated competency. See additional information, https://www.cmu.edu/hub/registrar/registration/transfer-transcripts.html Departmental transfer credit processes may vary. Please review information on your college of school of interest websites through https://www.cmu.edu/academics.

Section 29: Contact Information for Assistance in Obtaining Institutional or Financial Aid Information

Current Undergraduate Students:

Student Financial Aid Office
Mailing Address: Carnegie Mellon University, 5000 Forbes Avenue, Pittsburgh, PA 15213
Telephone: 412-268-8186
Fax: 412-268-8084
Email: thehub@andrew.cmu.edu
Website: https://www.cmu.edu/sfs/financial-aid/undergraduate/index.html

Prospective Undergraduate Students:

Student Financial Aid Office
Mailing Address: Office of Undergraduate Admission, Carnegie Mellon University, 5000 Forbes Avenue, Pittsburgh, PA 15213
Telephone: 412-268-2082
Fax: 412-268-7838
Email: admission@andrew.cmu.edu
Website: https://www.cmu.edu/admission/aid-affordability

Current and Prospective Graduate Students:

Student Financial Aid Office
Mailing Address: Carnegie Mellon University, Student Financial Aid Office, 5000 Forbes Avenue, Pittsburgh, PA 15213
Telephone: 412-268-8186
Fax: 412-268-8084
Email: thehub@andrew.cmu.edu
Website: https://www.cmu.edu/sfs/financial-aid/graduate/index.html

Section 30: Types of Financial Aid

There are various types of financial aid available for Carnegie Mellon students, including federal, state, and institutional. Understanding financial aid eligibility and the financial aid award letter will help students and families navigate financing decisions that need

to be made while attending Carnegie Mellon. Visit our website at https://www.cmu.edu/sfs/financial-aid/your-award/index.html for help in understanding your financial aid awards.

Undergraduate Grants

Grant assistance is awarded on the basis of demonstrated financial need. Students do not need to work for or repay grants. Grants are commonly referred to as "gift aid." More information may be found on our website, https://www.cmu.edu/sfs/financial aid/types/scholarships-and-grants/grants.html.

Federal Pell Grant

A Federal Pell Grant is awarded by the federal government to students with high financial need. Students who are eligible for a Federal Pell Grant after their aid package is determined, will notice a dollar-for-dollar reduction to their Carnegie Mellon need based grant funds. More information can be found on the Department of Education website, https://studentaid.gov/understand-aid/types/grants/pell.

Federal Supplemental Educational Opportunity Grant

A Federal Supplemental Educational Opportunity Grant (FSEOG) is for undergraduate students who have exceptional financial need. Carnegie Mellon usually awards these grants to students who receive a Federal Pell Grant. If there is a change in Federal SEOG eligibility, a dollar-for-dollar adjustment to the student's Carnegie Mellon need-based grant funds will occur. More information can be found on the Department of Education website, https://studentaid.gov/understand-aid/types/grants/fseog.

State Grants

Some states, including the state of Pennsylvania, provide educational grants to their residents who demonstrate need. View a list of participating states on https://www.cmu.edu/sfs/financial-aid/types/scholarships-and-grants/state-grants.pdf. Upon notification from any state agency of a student's eligibility, Carnegie Mellon will modify the student's financial aid package to reduce Carnegie Mellon need-based grant funds dollar-for-dollar.

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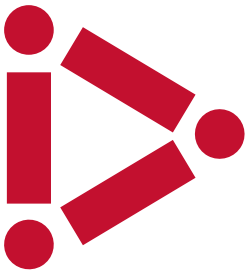

See the National Association of Student Financial Aid Administrators (NASFAA) website, https://www.nasfaa.org/State_Financial_Aid_Programs, for more information on state grants.

Graduate Scholarships, Grants, Stipends, Assistantships, Fellowships

Funding for graduate students may include scholarships, grants, stipends, assistantships, and fellowships. For information about these awards, contact the academic department you plan to attend. The department will be able to discuss the amounts and requirements for each type of funding.

Student Employment

There are three types of hourly student employment options available:
o Federal Work-Study (FWS): Funding = 40% Federal / 60% Employer
o Federal Community Service Work-Study (FCS): Funding = 70% Federal / 30% Employer
o **Non-Work-Study (NWS):** Funding = 100% Employer
Federal Work-Study (FWS) is a need-based self-help award. If a student has been awarded FWS, the FWS award is the total that can be earned during the academic year as a work-study student. It is important to note that funds earned in the Federal Work Study Program (including the Federal Community Service Work Study Program) are not credited to the student's account.
Students who do not have financial need or who have not applied for financial aid may find non-work-study job opportunities on campus.
More information about student employment is available on the following website:
· *FAQs:* https://www.cmu.edu/sfs/student-employment/faq.html
· *On Campus Employment for Students:* https://www.cmu.edu/career/students and-alumni/on-campus-employment/index.html
· *Student Hourly Positions:* https://www.cmu.edu/sfs/student employment/hourly-positions.html

Loans

Several types of loans are available to students who meet eligibility requirements. Information about federal, institutional, and private loans is available

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on https://www.cmu.edu/sfs/financial-aid/types/index.html. The site includes detailed information about loan terms and how to apply.

Note that the following disclosure is required for Carnegie Mellon students enrolled in California: If a student obtains a loan to pay for an educational program, the student will have the responsibility to repay the full amount of the loan plus interest, less the amount of any refund (amount returned to the loan program, if any). If the student has received federal student financial aid funds, the student is entitled to a refund of the moneys not paid from federal student financial aid program funds. Learn more about student account refunds on our website, https://www.cmu.edu/sfs/billing/refunds.html.

Federal Direct Student Loans

Federal Direct Student Loans are the most widely-used loan for college students. Eligibility is determined by completing the FAFSA. Types of Federal Direct Loans include Federal Direct subsidized, unsubsidized, and Plus (for parents or graduate students). Detailed information about Federal Direct Student Loans is available on our website, https://www.cmu.edu/sfs/financial-aid/types/federal-loans/direct/index.html.

Federal Loan Repayment

Federal student loans offer flexible repayment plans, loan consolidation, forgiveness programs, and more. View more information on loan repayment options on https://studentaid.gov/, where you can find comprehensive information about your federal loans, including your loan amounts and balances, your loan servicer and contact information, your interest rates, your current loan status, guidance on loan repayment options, etc.

Repayment plans determine your monthly student loan payment amount, how many years it will take to pay back what you borrowed, and how much interest you will pay over the life of your loan. Keep in mind, the longer it takes to pay back your loan, the more interest will accrue and increase the overall cost of your loan. *Note that any private loans you have borrowed do not appear on studentaid.gov.*

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Federal Student Loan Entrance Counseling*

All first-time Federal Direct Loan borrowers are required complete an online entrance counseling session after receipt of the financial aid award letter. The session provides information about borrower rights and responsibilities. CMU is notified when a student has completed entrance counseling. Students who have completed a federal entrance counseling session while at CMU, do not have to complete another one. You may view instructions on https://www.cmu.edu/sfs/financial-aid/types/federal-loans/direct/mpn entrance-counseling.html.

Student Rights and Responsibilities/Master Promissory Note (MPN)*

All first-time Direct Loan borrowers are required to complete a Master Promissory Note (MPN). The MPN is a legal document in which you promise to repay your loan(s) and any accrued interest and fees to the U.S. Department of Education. It also explains the terms and conditions of your loan(s) and sample loan repayments. All student borrowers must read and understand their rights and responsibilities when choosing to borrow a federal loan. The MPN is available on the U.S. Department of Education website, https://studentaid.gov/mpn/.

*Loan funds will not disburse until both Entrance Counseling and the MPN are completed.

Federal Loan Exit Counseling

Upon ceasing enrollment and prior to beginning loan repayment federal loan borrowers are required to complete an online exit counseling session. Federal loan exit counseling provides important information you need to prepare to repay your federal student loans. Topics include understanding your loans, plans for repayment, avoiding default, and making finances a priority. Exit counseling may be completed on the U.S Department of Education website, https://studentaid.gov/exit-counseling/. See also the *Direct Loan Exit Counseling Guide* on https://studentaid.gov/sites/default/files/exit counseling.pdf.

Yeknik Student Loan

The Yeknik Student Loan Fund is endowed by Wayne M. and Nancy Yeknik. It is an institutional loan awarded to students who are sophomores, juniors, and seniors,

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have a cumulative 3.0 QPA, and have financial need. More information is available on our website, https://www.cmu.edu/sfs/financial-aid/types/yeknik.html.

Private Education Loans

Private loans are a borrowing option for some students. Carnegie Mellon recommends that you review your federal, state, and institutional grants and loan options to compare borrower benefits and loan terms before opting to borrow a private education loan because the terms and conditions of federal student loans may be more favorable than those of private education loans.

Carnegie Mellon University does not endorse any lender. Carnegie Mellon uses a loan comparison tool called FastChoice (see, https://choice.fastproducts.org/FastChoice/home/324200) that is offered free-of charge to schools by the Great Lakes Higher Education Corporation. The lenders presented in FastChoice include lenders from whom our students have borrowed over the past two years and who have demonstrated a high level of service or other benefit to our students. This list is updated annually and is not-all inclusive. Students should understand that they may choose any lender they wish (even those not presented in Fast Choice) without penalty or unnecessary delays.

Private Loan Self-Certification Form

Pursuant to Section 155 of the Higher Education Act of 1965, as amended, (HEA) and to satisfy the requirements of Section 128(e)(3) of the Truth in Lending Act, a lender must obtain a self-certification signed by the applicant before disbursing a private education loan. The school is required on request to provide this form or the required information only for students admitted or enrolled at the school. The Self Certification form is available through your lender and on our website at https://www.cmu.edu/sfs/docs/private-loan-cert.pdf. If the information needed to complete the form is not pre-filled on the form, you may access the information on your financial aid award letter from the school or by contacting the Student Financial Aid Office at student-financial-aid@andrew.cmu.edu.

Lender Relationship Code of Conduct

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Carnegie Mellon officials are prohibited from accepting any financial or other benefits in exchange for displaying lenders and loan options in FastChoice. Our lender relationship code of conduct is published on https://www.cmu.edu/sfs/docs/loans-code-of conduct.pdf.

Section 31: Financial Aid Disbursements

Financial aid (including student loans) is disbursed one semester at a time based on the student's enrollment at the time of each disbursement. The Student Financial Aid Office begins to disburse aid to student accounts approximately 10 days before classes begin for students who have completed the necessary requirements.

Grants and Scholarships Disbursements

Grants and scholarships are determined by the Student Financial Aid Office and are applied directly to the student account on a semester basis to pay charges for tuition, fees and on-campus room and board (if applicable).

Federal Loan Disbursements

First-time Federal Direct Loan borrowers are required to sign a Master Promissory Note and complete loan entrance counseling before loan funds are credited to the student account. After these loan requirements are completed (no sooner than 10 days prior to the start of the semester), federal loans are disbursed to the student account. Disbursements are made to the student account in two equal payments (unless the loan is for one semester) - one for each semester covered by the loan. It is very important to understand that before federal student loans disburse, loan proceeds are reduced by the federal origination fee (see, https://studentaid.gov/understand aid/types/loans/interest-rates#fees) Upon disbursement, actual amounts may be viewed by logging into Student Information Online (SIO) on https://www.cmu.edu/hub/sio/about.html and selecting "Student Account Activity" from the "Finances" menu.

View loan disbursement dates here: https://www.cmu.edu/sfs/financial aid/index.html#disbursement

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Private Loan Disbursements

Generally, private loan disbursements occur at the beginning of each semester covered by the loan. Students should review their loan disclosures from their lender in order to determine the actual anticipated disbursement dates for private loans. Actual disbursements amounts can be viewed after they occur by logging into Student Information Online (SIO) on https://www.cmu.edu/hub/sio/about.html and selecting "Student Account Activity" from the "Finances" menu.

Federal Work-Study Disbursements

Students who are awarded Federal Work-Study may earn Federal Work-Study funds by working in positions with eligible employers. Wages are paid bi-weekly through the payroll system. **These funds are not disbursed directly to the student account.**

Outside Scholarships Disbursements

Once the Student Financial Aid Office receives outside scholarship funds, they are credited to the student account and the student is notified if the outside scholarship reduces their eligibility for other financial aid. If the scholarship provider issues the funds by check, the student will be contacted to endorse the check prior to the funds being credited to their student account.

Financial Aid/Student Account Refunds

When financial aid disburses, it is credited against the student account balance. If there is a credit balance remaining on the student account after all tuition and fees are paid, the student account is reviewed to determine if the student is eligible for a credit balance refund. If eligible, the refund is issued to the student either electronically (if you signed up for electronic refunding) or by paper check. View more information about refunds on our website, including electronic refund steps, on: https://www.cmu.edu/sfs/billing/refunds.html.

Section 32: Satisfactory Academic Progress Policy & Procedural Statement

To be eligible for federal, state, and institutional financial aid, all students are required to maintain Satisfactory Academic Progress toward the completion of a degree. Each university determines its own policy in accordance with federal regulations set forth by

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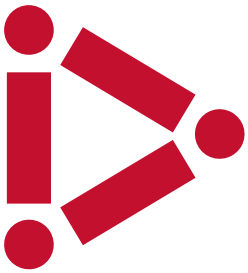

the U. S. Department of Education regarding satisfactory progress standards to ensure student success. To maintain Satisfactory Academic Progress at Carnegie Mellon University, students must meet the following minimum standards for both of the qualitative (QPA) and quantitative (completion rate) measures:

Student Type QPA (Qualitative)
Completion Rate (Quantitative)*

First Year Undergraduate 1.75 80%
Upperclass 2.00 80%
Graduate 3.00 80%

*To calculate the completion rate, the cumulative number of completed units is divided by the cumulative number of units attempted. Advance Placement credits are excluded from both figures. In addition to the above-mentioned Financial Aid Satisfactory Academic Progress standards, federal regulations require a student to complete their degree within a specified amount of time. The maximum timeframe cannot exceed 150 percent of the time published as needed for completion of the program. Scope: This policy applies to Federal aid including Federal Pell Grants, Federal Supplemental Educational Opportunity Grants, Federal Work-Study, Federal Direct Loans, and Federal Direct PLUS Loan programs; state grant aid; and Carnegie Mellon institutional aid including grants, loans, and scholarships.

Federal regulations can be found at: Federal Student Aid Handbook, Volume 1 Chapter 1 School Determined Requirements 34 CFR 668.16(e) 34 CFR 668.32(f) 34 CFR 668.34

Evaluation:

Carnegie Mellon evaluates all students for Financial Aid Satisfactory Academic Progress annually, at the end of the spring semester. Students that are included in the review are undergraduates, graduates, both full-time and part-time. Courses that do not count toward a student's degree cannot be used to determine enrollment status for financial aid purposes. Carnegie Mellon will count transfer credit hours that are accepted toward a student's educational program as both attempted hours and

completed hours. Advanced Placement Non-Degree and Non-Credit courses are not counted as units passed or attempted. When a course is repeated, all grades will be recorded on the official academic transcript and will be calculated in the student's QPA.

For financial aid eligibility, only one repeat per course is permitted in the determination of enrollment status for courses previously passed. If the student withdraws and is not assigned a W grade, then it will not be counted in the number of units attempted or completed. If the W grade is assigned, the units will be counted in the number of units attempted and will be counted as zero in the number of units completed. If the student has incomplete units, the units will be counted as attempted and will be counted as zero in the number of units completed.

The Financial Aid Satisfactory Academic Progress evaluation is a cumulative review of all semesters, regardless of whether or not the student received financial aid during the academic year. If the minimum requirements are not achieved, the student is ineligible to receive financial aid. In such a case, the student is notified and given an option to appeal their financial aid status. More information about the appeal process can be found at www.cmu.edu/sfs/financial-aid/policies/academic-progress.html. A financial aid package will not be completed unless an appeal is received, approved and processed accordingly. If by chance a financial aid package is processed and released to the student, it is conditional and subjected to financial aid removal until an appeal is received, approved and processed accordingly. Contact: Questions regarding this policy or its intent should be directed to the Student Financial Aid Office at 412- 268-1353.

Appeal Process

Carnegie Mellon realizes that extenuating circumstances may contribute to a student's inability to achieve Satisfactory Academic Progress. Once a student receives notification of their Financial Aid Satisfactory Academic Progress status and it is determined that they are not making progress, the student is encouraged to appeal the determination.

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A letter of notification will be mailed to the student that will address the requirements for Satisfactory Academic Progress and define the student's specific academic progress to date. This letter will also address the appeal process and provide directions for filing the appeal.

A student may appeal a Financial Aid Satisfactory Academic Progress decision by writing a letter explaining the extenuating circumstances, defining information that prevented them from making academic progress and what has changed in their situation that would allow them to demonstrate satisfactory academic progress at the next evaluation. The next period of evaluation will be defined in the appeal notification and may be the next semester or combination of enrollment periods.
This letter should be attached to the Financial Aid Satisfactory Academic Progress Appeal Form and returned to The HUB, ATTN: Financial Aid Academic Progress. The student will be notified in writing of the appeal decision within two weeks of the receipt of the appeal.

Examples of Appeals:
o Extended illness
o Changes in major
o Difficult transition to first-year in college (academically and socially)
o Recent diagnosis of learning disability
o Recent death of a close family member

If summer courses at Carnegie Mellon will enable the student to meet the minimum academic progress requirements, the student will regain financial aid eligibility. The student should submit an appeal or send an email to thehub@andrew.cmu.edu indicating that they have now achieved Satisfactory Academic Progress due to summer course completion. If the student takes courses at another institution during the summer that will increase the number of units completed, they will need to forward a copy of the official transcript to their HUB liaison with the copy clearly marked "ATTN: Financial Aid Academic Progress."

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If there are missing grades for the spring semester, the student will need to have their instructor update the missing grades. Grades can be checked via Student Information Online (SIO) on our website, https://www.cmu.edu/hub/sio/about.html. When all missing grades have been updated, the student should email their HUB liaison to indicate that Satisfactory Academic Progress has been achieved due to the updating of missing grades.

If an appeal is approved for the fall semester only, then the fall semester is considered a probationary semester for financial aid eligibility. To be eligible for financial aid funds for the spring semester, the student is required to achieve a cumulative 2.0 QPA (3.0 for graduate students) and successfully pass a minimum of 80% of the accumulated units attempted/carried. Financial Aid Satisfactory Academic Progress evaluation and reinstatement of spring financial aid occurs shortly after the fall grade submission deadline.

Depending on the nature of the appeal, the appeals committee may require the student to develop an academic plan in consultation with their academic advisor, which may put the student on track to successful program completion. This will be determined on an individual student basis and depend on the length of the student's enrollment, class completion rate and earned grade point average. All subsequent or second appeals will require an academic plan.

If the student is required to develop an academic plan, their progress is reviewed at the end of each payment period according to the requirements specified in the plan. If the student is meeting the requirements of the academic plan, they are eligible to receive financial aid as long as they continue to meet those requirements.
If an appeal is denied, the student should make arrangements to meet with their HUB liaison and an Associate Director of Student Financial Aid to discuss funding options. If an appeal is not received, the student is not eligible to receive financial aid.

Financial Aid Academic Progress Improvement Plan

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Students who are unable to meet the minimum satisfactory academic requirements for Financial Aid Satisfactory Academic Progress may be required to design and submit a Financial Aid Academic Progress Improvement Plan (pdf) (see, https://www.cmu.edu/sfs/docs/academic-plan.pdf). The goal of the improvement plan is to ensure the student makes documented steady progress toward meeting our Financial Aid Satisfactory Academic Progress standards and graduates within the university's normal time frame to complete a degree. The need for the plan will be determined on an individual student basis and depend on the length of the student's enrollment, class completion rate and earned grade point average. All subsequent or second appeals will require an academic plan. View more details about the Financial Aid Academic Progress Improvement Plan on our website, https://www.cmu.edu/sfs/financial-aid/policies/academic-plan.html.

Section 33: Federal Title IV Verification Policy and Procedural Statement

Policy Reason

The U. S. Department of Education requires that Federal Title IV applicants provide documentation to verify the accuracy of the information submitted on the Free Application for Federal Student Aid (FAFSA) each year. Federal regulations include verification as part of the Federal Student Aid (FSA) program requirements, and it is required for applicants for most FSA programs with the exception of students receiving only a parent or graduate PLUS loan or an unsubsidized Stafford loan. Each university is required to have policies for verifying the reported information. Federal regulations can be found at: Federal Student Aid Handbook Application & Verification Guide Chapter 4: Verification, Updates, and Corrections 34 CFR 668.51-61.

Policy and Procedural Statement

Federal verification guidelines require that applicants are selected for verification by the Central Processing System (CPS) or by the school. At Carnegie Mellon, federal verification is performed on all applicants selected by the CPS and any application that the university has reason to believe is incorrect or has conflicting documentation.

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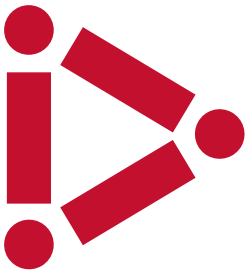
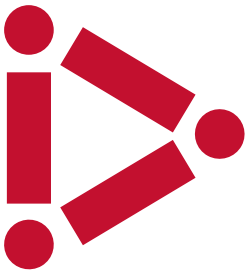


Under certain circumstances a CPS selected application may be excluded from some or all of the federal verification requirements due to the following unusual circumstances including:
· death of the student,
· not an aid recipient,
· applicant is eligible to receive only unsubsidized student financial assistance, · applicant verified by another school or post enrollment (the student was selected for verification after ceasing to be enrolled).
With the exception of the death of the student, however, none of these exemptions excuse the university from the requirement to resolve conflicting information.

Federal verification must typically be completed prior to the end of the academic year or before the student ceases enrollment, whichever occurs first. Students, who fail to comply with verification requirements, including submitting documentation within required timelines, will not have Federal Title IV funds disbursed and may have Federal Title IV funds cancelled. Carnegie Mellon considers the student to be the responsible party for providing information and completing the verification process. Carnegie Mellon identifies the students selected for verification during the financial aid application process by viewing the FAFSA output document called the Institutional Student Information Record (ISIR). A review of the student's financial aid application occurs after ISIR data is received and data entry of required information is completed. The ISIR will provide information about the student and family including a calculated

Expected Family Contribution (EFC), document codes identifying specific information about the applicant data submitted, and written comments. The written messages provide additional information for the applicant to follow. The federal verification message for the student reads: "Your FAFSA has been selected for a review process called verification. Your school has the authority to request copies of certain financial documents from you and your parent(s)." The verification activity will initially compare applicant data for accuracy and completeness and continue to resolve



conflicting information. In this process Carnegie Mellon requires verification of the following items:

For all applicants:
- Household size
- Number in college

For non-tax filers:
- Income earned from work

For tax filers:
- Adjusted Gross Income (AGI)
- U.S. income tax paid
- Income earned from work
- Education tax credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit)
- Other untaxed income reported on tax return, for example: untaxed portions of Individual Retirement Account (IRA) distributions, untaxed portions of pensions, IRA deductions and payments, tax-exempt interest income

To complete the verification process acceptable documentation may include IRS Tax Transcripts, IRS Tax Forms (1040, 1040-SR, 1040-NR, and requested tax schedules), W 2's and the CSS/Financial Aid PROFILE. To resolve discrepancies in reported information students may be required to submit additional documentation. Verification results that require changes to the applicant information and subsequent changes to the student's financial aid package will be made prior to final disbursement of federal funds. For all students eligible for subsidized Title IV aid the university will make appropriate changes to the student information electronically through the Department of Education's CPS to ensure each student has a correct valid ISIR. The student will be notified of this adjustment through a revised financial aid award letter.

If the verification results do not justify aid already disbursed, the student is responsible for repaying all aid for which they are not eligible. Failure to meet the

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repayment obligation will result in the student being referred by Carnegie Mellon to the U.S. Department of Education.

Verification results that reveal possible fraud or criminal misconduct in connection with the financial aid application or verification processes will result in the matter being referred by Carnegie Mellon to the Office of the Inspector General of the U.S. Department of Education for investigation. In the event that individual circumstances and unusual situations are not addressed or defined through standard verification procedures, additional review is necessary. These cases must be sufficiently documented and may be processed in accordance with regulations as defined in Professional Judgment and Dependency Overrides Statute: HEA Sec.479A(a)(7) and Sec. 480 (d)(7).

Federal Title IV Funds Disbursements

Carnegie Mellon completes federal verification for selected applicants as a requirement of completing a student's financial aid application. Federal Title IV funds will not be disbursed until federal verification is completed. In some instances the institution can make an interim disbursement of funds if it has no reason to believe that the application information is inaccurate. If the institution makes an interim disbursement, the verification process must be completed prior to the disbursement of any additional funds. In all instances the institution is liable for an interim disbursement if verification identifies an overpayment or the student fails to complete verification.

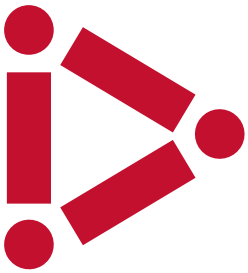
Contact

Questions regarding this policy or its intent should be directed to the Student Financial Aid Office at 412- 268-1353.

Section 34: Return to Title IV Funds Policy and Procedural Statement (effective 7.1.2021)

Policy Reason

The U. S. Department of Education requires that the university determine the amount of Federal Title IV aid earned by a student who withdrawals of fails to complete the



period of enrollment. The university *must determine the earned and unearned portions of Title IV aid as of the date the student ceased* attendance based on the amount of time the student has spent in attendance. Unless the student meets one of the exemptions below in items 1 – 4, up through the 60% point in the period of enrollment, a pro rata schedule is used to determine the amount of Title IV funds the student has earned at the time of withdrawal. After the 60% point in the period of enrollment a student has earned 100% of the Title IV funds they were scheduled to receive. For a student who withdraws after the 60% point-in time, there are no unearned funds.
Effective July 1, 2021, there are four ways in which a student enrolled in a program delivered in modules** is exempt from the normal rules for return of Title IV funds (R2T4) mentioned above, and thus is not considered to be a withdrawal. Even though a student may meet one of the exemptions for R2T4, a student's cost of attendance and financial aid may need to be reduced if the student does not attend all periods of enrollment for which Title IV aid has been determined. The 4 exemptions are:
1. If the student has completed all requirements for graduation within the payment period or period of enrollment;
2. If the student successfully completes Title IV-eligible coursework in one module or a combination of modules that equals 49% or more of the number of countable days** in the payment period or period of enrollment; or
3. If the student successfully completes Title IV-eligible coursework equal to or greater than what the school considers to be half-time enrollment (18 units) for the payment period or period of enrollment.
4. If a student who has dropped all classes except for classes in a future module within the semester has provided written confirmation to the school of their intention to return within 45 days within the same semester. Pre-registration does not constitute written confirmation.
*A student is considered to be enrolled in a program delivered in modules in any semester in which the student is enrolled in any class that does not span the entire semester.
**Countable days for calculating the 49% exemption include the first day of classes up to and including the last day of classes in the student's individual enrollment

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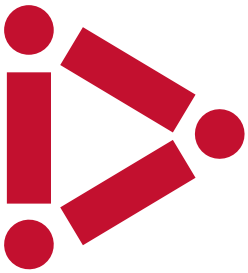


period (semester or mini), including days between modules and excluding breaks of 5 or more days.
All courses for which the student is registered AND courses for which the student has begun attendance are considered when determining the 49% exemption, even those courses that have been dropped. Federal regulations can be found at: Federal Student Aid Handbook, Volume 5 Chapter 1 Withdrawals and the Return of Title IV Funds; 34 CFR 668.22

At Carnegie Mellon, Title IV funds are awarded to a student under the assumption that the student will attend school for the entire period for which the assistance is awarded. When a student withdraws, the student may no longer be eligible for the full amount of Title IV funds that the student was originally scheduled to receive.

If a recipient of Title IV grant or loan funds withdraws from a school after beginning attendance, the amount of Title IV grant or loan assistance earned by the student must be determined. Additionally, if a recipient of Title IV grant or loan funds who is enrolled in a program delivered in modules does not attend all scheduled modules or withdraws from a module, the school must determine whether the student is considered to be a Title IV withdrawal and must determine the amount of Title IV grant or loan assistance earned by the student. If the amount disbursed to the student is greater than the amount the student earned, the unearned funds must be returned. If the amount disbursed to the student is less than the amount the student earned, and for which the student is otherwise eligible, the student is eligible to receive a Post-withdrawal disbursement of the earned aid that was not received.

Carnegie Mellon determines the Withdrawal Date and Date of Determination to complete the return of funds calculation. A student's withdrawal date and date of determination varies depending on the type of withdrawal. When a student provides official notification to Carnegie Mellon through the Student Leave of Absence and Withdrawal Process, the withdrawal is defined as an official withdrawal. When the student does not complete the Student Leave of Absence and Withdrawal Process and no official notification is provided by the student, it is considered an

unofficial withdrawal.

Leave of Absence/Withdrawal Process

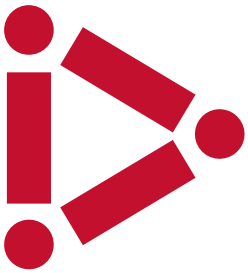
A student may leave Carnegie Mellon by either taking an academic leave of absence (leaving the university temporarily with the firm and stated intention of returning) or by withdrawing from the university (leaving the university with no intention of returning). In accordance with the provisions of CFR 668.22, regardless of the reason for taking an academic leave of absence, both academic leaves and withdrawals at Carnegie Mellon University are considered withdrawals for Title IV purposes. That is, the student begins any applicable grace period for loan repayment as of the date of the academic leave or withdrawal, regardless of the reason for leaving school or the intention to return. Students choosing to take an academic leave of absence should first contact their academic advisor to discuss their plans while on leave and to work out any conditions that may be necessary for a smooth return to Carnegie Mellon. A student deciding to leave the university should take the following steps:

• Complete a Leave of Absence or Withdrawal Form.
• The form must include all necessary signatures or the process will not be completed.
• Return the completed form to the University Registrar's Office, 5000 Forbes Ave., Warner Hall A12, Pittsburgh, PA 15213.

Determination of Withdrawal Date

Official Withdrawals (Notification Provided by the Student)

Those withdrawals defined as official are processed in accordance with federal regulations. The Office of the Registrar provides information that identifies which students have processed a Student Leave of Absence and Withdrawal Form for each semester. This information includes the Date of Withdrawal, the Date of Determination, Withdrawal/Leave Status (LA, LS, & W2) and the semester of attendance. This information is maintained in the student's academic file and in the university's Student Information System. For students who notify the university of their intent to withdraw or take a leave of absence, the official date of withdrawal or leave of absence is the earliest of:
• Date the student began the withdrawal or leave of absence process;

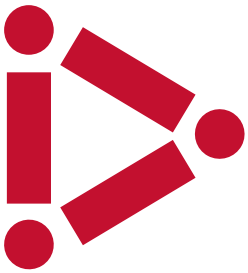


• Date the student notified his or her home department;
• Date the student notified the associate dean of his or her college; or
• Date the student notified the dean of students.

Unofficial Withdrawal (No Official Notification Provided by the Student) For a student who withdraws without providing notification to Carnegie Mellon, the institution determines the withdrawal date using defined criteria. This category of withdrawals includes students that drop out and students that do not earn a passing grade.
To identify the unofficial withdrawals the Registrar develops a preliminary list of students that did not complete the semester by reviewing the final student grade reports. The list includes all students with:
a) semester units carried,
b) 0 semester units passed,
c) 0 quality points earned, and
d) 0.0 QPA.
The Registrar contacts the academic divisions about each student to determine if the student actually completed the semester and earned the grades (0.0) or failed to complete the semester and did not notify the university of their status. For students who do not notify the university of their intent to withdraw or take a leave of absence, the official date of withdrawal or leave of absence is:
• The midpoint of the semester or;
• The last date the student attended an academically-related activity such as an exam, tutorial or study group, or the last day a student turned in a class assignment.

Date of Determination that the Student Withdrew

Carnegie Mellon is not required to take attendance and the Date of Determination that a student withdrew varies depending upon the type of withdrawal:
Official or Unofficial
1. For withdrawals where the student provided Official Notification the Date of Determination is:
a. The student's withdrawal date,
b. or the date of notification, whichever is later.



2. For withdrawals where the student did not provide Official Notification the Date of Determination is:
a. The date the institution becomes aware the student has ceased attendance.
b. For a student who withdrawals without providing notification to the institution, the institution must determine the withdrawal date no later than 30 days after the end of the enrollment period.

Calculation of Earned Title IV Assistance

The withdrawal date is used to determine the point in time that the student is considered to have withdrawn so the percentage of the period of enrollment completed by the student can be determined. The percentage of Title IV aid earned is equal to the percentage of the period of enrollment completed. Unless a student who is considered to have withdrawn meets one of the 4 exemptions listed above, the amount of Title IV federal aid earned by the student is determined on a pro-rata basis up to the end of 60% of the semester. For example, if the student completed 30% of a term, 30% of the aid originally scheduled to be received would have been earned. Once a student has completed more than 60% of a term, all awarded aid (100%) has been earned. The percentage of federal aid earned and the order in which the unearned aid is returned are defined by federal regulatory requirements.
The calculation of earned Title IV funds includes the following grant and loan funds if they were disbursed or could have been disbursed to the student for the period of enrollment for which the Return calculation is being performed:

- Pell Grant
- Iraq and Afghanistan Service Grant
- TEACH Grant (not available at Carnegie Mellon)
- FSEOG Grant
- Federal Direct Loan

Institutional Charges

Institutional charges are used to determine the portion of unearned Title IV aid that the school is responsible for returning. Carnegie Mellon ensures that all charges for tuition, fees, living expenses, as well as all other applicable institutional charges are included in the return calculation. Institutional charges do not affect the amount of Title

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IV aid that a student earns when they withdraw. The institutional charges used in the calculation
usually are the charges that were initially assessed the student for the period of enrollment. Initial charges are only adjusted by those changes the institution made prior to the student's withdrawal (for example, for a change in enrollment status unrelated to the withdrawal). If, after a student withdraws, the institution changes the amount of institutional charges it is assessing a student, or decides to eliminate all institutional charges, those changes affect neither the charges nor aid earned in the calculation.

Return of Unearned Funds to Title IV

If the total amount of Title IV grant and/or loan assistance that was earned as of the withdrawal date is less than the amount that was disbursed to the student, the difference between the two amounts will be returned to the Title IV program(s) and no further disbursements will be made. If a student has received excess funds, the College must return a portion of the excess equal to the lesser of the student's institutional charges multiplied by the unearned percentage of funds, or the entire amount of the excess funds. The funds will be returned in the order below as prescribed by federal regulations, within 45 days from the date of determination that a student withdrew.

- Unsubsidized Federal Stafford Loans
- Subsidized Federal Stafford Loans
- Federal PLUS loans
- Federal Pell Grants
- Federal Supplemental Educational Opportunity Grants (FSEOG)

Post-Withdrawal Disbursements

If the total amounts of the Title IV grant and/or loan assistance earned as of the withdrawal date is more than the amount that was disbursed to the student, the difference between the two amounts will be treated as a post-withdrawal disbursement. In the event that there are outstanding charges on the student's account, Carnegie Mellon will credit the student's account for all or part of the amount of the post-withdrawal disbursement up to the amount of the allowable charges. Any

amount of a post-withdrawal disbursement that is not credited to a student's account will be offered to the student within 30 days of the date that the institution determined that the student withdrew. Upon receipt of a timely response from the student, the College will disburse the funds within 90 days of the date of determination of the student's withdrawal date.

Contact

Questions regarding this policy or its intent should be directed to the Student Financial Aid Office at 412-268-1353.

Section 35: Carnegie Mellon Ethics Hotline

The health, safety and well-being of the university community are top priorities at Carnegie Mellon University. CMU provides a hotline that all members of the university community should use to confidentially report suspected unethical activity relating to financial matters, academic and student life, human relations, health and campus safety or research. Students, faculty and staff can anonymously file a report by calling 877-700-7050 or visiting www.reportit.net (user name: tartans; password: plaid).
All submissions will be reported to appropriate university personnel. The hotline is NOT an emergency service. For emergencies, call University Police at 412-268-2323.

Section 36: Statement of Assurance

Carnegie Mellon University does not discriminate in admission, employment, or administration of its programs or activities on the basis of race, color, national origin, sex, handicap or disability, age, sexual orientation, gender identity, religion, creed, ancestry, belief, veteran status, or genetic information. Furthermore, Carnegie Mellon University does not discriminate and is required not to discriminate in violation of federal, state, or local laws or executive orders.
Inquiries concerning the application of and compliance with this statement should be directed to the Office for Institutional Equity and Title IX, Carnegie Mellon University, 5000 Forbes Avenue, Pittsburgh, PA 15213, telephone 412-268-7125.
Obtain general information about Carnegie Mellon University by calling 412-268-2000.

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