



Written Questions and Answers

Financial Aid Management System

Modernization and Integration

RFP UK-2588-26

Closing Date: April 17, 2026

Today's Date: March 20, 2026

No.	Question	Answer
1	What is the total number of ISIRs received annually?	2025-26 – 74,720; Unduplicated – 54,028 For 2026-27 59,281 – Unduplicated – 46,729
2	What is the total number of aid recipients?	2024-25 – offered – 33,278; paid – 29,457 2025-26 – offered – 35,348; paid – 30,626
3	Does the University operates under a single OPEID?	00198900 – FSA added
4	Request for a three week extension of the current due date of March 26, 2026.	See Addendum #1.
5	The RFP references integration with the University's SAP enterprise system. Could you clarify which SAP modules are currently used to support financial transactions related to student accounts and financial aid?	SAP modules: Human Capital Management, Financial Accounting, Controlling, Materials Management, Plant Maintenance, Student Lifecycle Management
6.	Are current integrations between financial aid systems and SAP batch-based, file-based, or API-driven?	SAP integrations are API-driven with our data lake (HANA) as the data source. ProSAM also connects with SAP through Java connections to make RFC calls for tuition and fee data as well as to post awards. Multiple batch jobs exist to import flat files (e.g. SAG forms, Memo files, HKEAA project files). The myUK portal interacts with ProSAM via web services. HKEAA project files). The myUK portal interacts with ProSAM via web services.ProSAM connects to

		Finally, the ProSAM server connects to other instances of ProSAM, an Ellucian server for file integrations, and UK's file server for file integrations.
7.	What financial aid system is currently used to administer aid packaging and disbursement?	Sigma ProSAM
8.	Approximately how many FAFSA records and financial aid applicants are processed annually?	2024-25 – 36,196 file complete with FAFSA on file 2025-26 – 39,247 file complete with FAFSA on file
9.	How many financial aid staff currently support packaging, verification, and awarding operations?	35-40 staff
10.	Could the University provide additional details on the current packaging methodology (e.g., need-based sequencing, institutional grant prioritization, program-specific packaging)?	We currently award students using the federal methodology and award all federal and state need based awards on a first come first serve basis until funds are exhausted. Future plans would be to automate all institutional awards, both merit and need based awards.
11.	How many institutional scholarship programs are currently administered by the financial aid office?	Approximately 3,000 – 4,000 scholarship awards on an annual basis. This includes many departmental and college awards outside of the Office of Student Financial Aid and Scholarships (OSFAS).
12.	What implementation timeline or target go-live term does the University envision for the new system?	Implementation would hopefully start the fall of 2026, with new ISIRs begin loading in October 2027 for the 2028-2029 school year.
13.	How many years of historical financial aid data would the University expect to migrate into the new system?	Ideally 10 years maximum.
14.	What middleware software does UK use?	Custom internal developed middleware.
15.	Can the proposal due date be extended to April 16, 2026?	See Addendum #1.
16.	Are India-based and/or other global (off-shore or near-shore) resources acceptable for this engagement?	The University does not permit its data to be transmitted or stored outside the United States.
17.	What FTE commitment does UK expect to provide for project management and change management?	2.5 – 3.5 from OSFAS and there would need to be commitment from ITS and other campus partners with regards to the integration with SAP
18.	Do the Contract Terms (Initial term 4 years, up to 3 one-year renewals) apply to both the software contract and the implementation partner contract?	No, we are anticipating the implementation partner contract to be 1-2 years at the most.

19.	Does UK have a preferred integration middleware?	No
20.	Are there UK-specific financial aid programs requiring custom logic or integrations?	Kentucky State financial aid; Alternative Loans(ELM); Heartland/ECSI – Institutional Loans, Ellucian Student Forms and Scholarship Universe, Payroll for student employment, Salesforce
21.	What current financial aid and/or scholarship system(s) is UK using today, and what key limitations or failure points prompted the RFP?	Sigma ProSAM –We have made multiple enhancements to increase efficiencies. We are hoping to build upon these previous operational improvements to further optimize the administration of our programs and ensure we are using the most effective tools available for our long-term goals.
22.	Does UK have a CRM system for communications to students?	Salesforce – For currently enrolled students Slate – For prospective students
23.	What training avenues does UK intend to use (LMS, instructor-led, reference materials, job aids, etc.)?	Combination of many different avenues, from presentations, instructor-led, job aids and other materials.
24.	Does UK expect the FAMS to integrate with an existing UK-branded portal?	Yes, institutional student portal (MyUK).
25.	Which reporting tools does UK currently use (e.g. SAP HANA), and does UK expect embedded analytics or BI integrations? Does UK have a data warehouse?	SAP HANA (data lake) Select tables are replicated daily Tableau
26.	Does UK require automated connections to state agencies and, if so, which?	No, not at this time.
27.	What is UK's target aid year for go-live?	2028-2029 academic year
28.	Do you expect to go live with all of UK's academic programs—including professional schools—for the same aid year?	Yes, all programs would be expected.
29.	Does UK require a legacy system parallel processing period?	We would like to have some parallel processing during the transition period.
30.	What level of UK staff participation is expected for configuration, testing, and training?	Two-three primary staff within OSFAS with area leads or designee within OSFAS participating in testing and training, depending on the module.
31.	With what other campus and external systems/software (Slate, EAB, Scholarship Management, ELM, etc.) is the FAMS required to integrate?	SLATE, Scholarship Universe, Institutional Portal(MY UK), SAP, Salesforce, ELM, KHEAA, Ellucian Student Forms, Heartland ECSI, Clear Cost Calculator
32.	Is SAP hosted or on prem at University of Kentucky?	Currently on-prem but scheduled to cut over to SAP hosted in July 2026.

33.	How many total scholarships does the University of Kentucky currently manage?	3,000 – 4,000
34.	Does an integration exist with the scholarship management system for importing awards into the current FAM or is that a manual process?	It is currently a manual batch process but looking to enhance the process to be more automated.
35.	Will the University of Kentucky continue to leverage a 3rd party scholarship management system?	Yes, Scholarship Universe for the foreseeable future.
36.	Are there other institutional funds which University of Kentucky awards to include merit / other enrollment discounts or employer-type discounts? Can you both characterize these awards and where you intend to have these managed in the future?	Academic Common Market (regional in-state tuition rate for eligible majors) and other in-state tuition rate program (veterans, Reserves, KY National Guard) are handled through SAP via fee calculation categories. Employee/Family Education Program batch loaded into FAMS and uploaded to student accounts. Intend to have this cohort managed through SAP in the future. Other KY state law mandated tuition waivers/awards are also managed through SAP and/or within our current FAMS.
37.	In order to ensure we receive answers to questions asked, we would like to request a 1 week extension on the due date to April 2nd. Will the University consider that?	See Addendum #1.
38.	Does the university utilize preferred middleware (boomi, iData, Hana, Mulesoft, etc.) for out-bound / inbound integration requirements with SAP?	UK utilizes an in-house tool for file transfer as well as GoAnyWhere for inbound and outbound integrations.
39.	What is the University of Kentucky's preferred pattern for SAP integration (APIs, flat-file, SFTP, IDocs, etc)?	APIs are preferred.
40.	Does the University of Kentucky utilize the same packaging philosophy for all campuses (federal first, need-based priority, merit stacking, etc)?	Merit first, then federal, state, need based.
41.	What specific financial aid transactions or data elements must be exchanged between the financial aid system and SAP (e.g., awards, disbursements, refunds, student account balances)?	Awards, Disbursements, Actual Disbursement Dates, Student Charges, Student Account Balances and Refunds, Enrollment Information, Updates & Status changes, Estimated Aid, Title IV Charges, Funds Management, and Student Payroll transactions

42.	Beyond SAP, are there additional systems the proposed solution must integrate with, such as CRM platforms, document management systems, identity management systems, or scholarship management platforms?	SLATE, Scholarship Universe, Institutional Portal(MY UK), SAP, Salesforce, ELM, KHEAA, Ellucian Student Forms, Heartland ECSI, Clear Cost Calculator
43.	Does the University currently use a document management or imaging system to support financial aid verification and document collection?	Ellucian Student Forms – Verification and ISIR related changes, Satisfactory Academic Progress. Scholarship Universe – Certain scholarship application and file information. SAP - Student File Management for other imaged documents.
44.	What system currently manages student billing and refunds, and will the proposed financial aid solution need to integrate with it?	SAP. Yes, we will need to integrate with the system.
45.	How many financial aid disbursement cycles typically occur per academic term?	UK has part of term modules but we disburse once per term on a daily basis with exceptions. We also will run prior year disbursements for institutional aid and some external aid and alternative loans. Three primary disbursement cycles per academic year: fall (includes winter term for FA purposes), spring, summer (trailer)
46.	Are there specific regulatory compliance challenges or audit findings the University hopes to address through the implementation of a new financial aid management system?	None.
47.	How are Return to Title IV (R2T4) and Satisfactory Academic Progress (SAP) calculations currently managed?	Manual process for R2T4 using the COD functionality. Satisfactory Academic Progress is a manual process through SAP system.
48.	What platform currently provides student self-service access to financial aid information, and would the new solution need to integrate with or replace that capability?	Institutional Student Portal (MyUK) and the new solution will need to integrate, but not replace.
49.	What reporting or analytics tools are currently used to support financial aid operational and compliance reporting (e.g., SAP BI, Tableau, Power BI)?	SAP, HANA, and Tableau.

50.	Out of the approximately 39,000 students, how many students are Title IV students?	2024-25 – 29,457 offered Title IV aid; 17,230 paid Title IV aid 2025-26 – 30,626 offered Title IV aid; 22,178 paid Title IV aid
51.	Section 3.20 of the RFP states that the successful Contractor must register with PaymentWorks but section 6.30 states that payment will be made through Payment Plus. Can you confirm these are separate, distinct systems?	Section 3.20 is letting prospective participants know that if they are awarded a contract, they will need to register as a vendor through PaymentWorks. We will send an invitation as needed. Section 6.30 is listing the three (3) payment options that can be selected in PaymentWorks.
52.	Would the University of Kentucky be willing to provide the quarterly report template referenced in 6.22 now?	This will be provided to the awarded vendor(s).