

Employee Pay & Tax Self-Service Portal

RFP / Evaluation Checklist - for hospital HR, Payroll, HRIS & IT

Use this checklist to evaluate an employee self-service portal for a hospital workforce. The questions that separate a hospital-fit portal from a generic one are about reach (deskless staff), dual US/Canada tax delivery, offboarded access, and where the data lives. Score each item for every vendor you consider.

Reach & access

- Works fully from a personal phone (browser, no app install required)
- Reaches deskless and frontline staff who have no corporate computer or email
- Available off the corporate network (home, break room, cellular)

Authentication & identity

- Authenticates against our existing directory / single sign-on (no new passwords)
- Access ends automatically when employment ends

Documents & functions

- Pay statements: current and historical, view and print on any device
- W-2 (US) self-service, posted by January 31
- T4 (Canada) self-service via a secure portal
- Time-off and benefit balances on the dashboard, updated from payroll
- News and links that reach non-desk staff

Former / offboarded employees

- Secure, role-scoped access for former employees
- Honors IRS rules (W-2 available through Oct 15) and CRA rules (former-employee paper default)

Compliance & security

- Every login and document access is logged
- Role-scoped: employees see only their own data
- Electronic W-2 consent and disclosure handled per IRS requirements
- Printable pay-stub access that travels across state rules

Deployment & data

- Where does our data live: our environment, or a vendor cloud?
- Any third-party host anywhere in the data path?
- Runs under our own controls and certifications

Operations

- Publish-once: corrections re-publish, no manual reprints
- Sits alongside the payroll / HRIS we already run

Want to see how Bluefish answers every box?

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