



IRS Releases New Draft of the 2020 Form W-4

The IRS released a new draft of the 2020 Form W-4. A second draft will be released later in July while the final form will be released in November. The IRS has made small changes to the Form W-4 multiple times recording as far back as 1990. Some of these changes have been as small as adding one clarifying sentence to a paragraph. This year, the difference is much more significant. So, why is this such a big deal for taxpayers?

First, withholding allowances are going away. The 2017 Tax Cuts and Jobs Acts made major revisions affecting taxpayer withholding. More specifically, changes in the law made personal exemptions, which were tied to withholding allowances, obsolete. Withholding allowances were a long-time staple on the Form W-4. The internet is full of articles and step-by-step guides on how to fill out your Form W-4 and how many withholding allowances to claim. However, according to a study released in 2018, 55 percent of Americans still cannot explain the Form W-4. The complexity of the Form W-4 has confused Americans for years. The IRS hopes that the 2020 Form W-4 along with the elimination of withholding allowances will provide simplicity, accuracy, and privacy for the employee while minimizing burdens for employers and payroll processors.

Second, in order to ensure the most accurate withholding, the new 2020 Form W-4 asks employees to disclose personal financial information that they may not want their employer to know. For example, line 4a "Other Income" states "If you want tax withheld for other income you expect this year that will not have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income." Employees may not want to disclose the amount of income they make in a year from their side hustle, investments, and any other income-generating activity. The good news for employees who do not wish to disclose this information is that the field is optional.

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The draft of the 2020 Form W-4 is not final yet and may undergo more changes. The IRS is allowing comments on the form for 30 days, and then a new draft will be curated. Until the 2020 Form W-4 is posted with a standard cover sheet and announced as final, the 2020 form should not be used.

Taxpayers should be aware of the new changes, but they are not required to submit a new form in response to the redesign. Employers can continue to compute withholding based on the information from the employee's most recently submitted Form W-4.

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How to Curb Workplace Retaliation Claims

Retaliation was once again the most frequent charge filed with the Equal Employment Opportunity Commission (EEOC) in fiscal year 2018, followed by sex, disability and race discrimination charges, according to agency data.

Retaliation claims are pursued with more regularity because even if an underlying claim of discrimination or harassment has little to no merit, employees can still win retaliation lawsuits if they were disciplined after bringing a reasonable complaint, Howard noted. So employers should be prepared to show that any disciplinary action taken was unrelated to the employee's protected conduct.

What Is Retaliation?

Under federal and state laws, job applicants and employees have the right to work free from discrimination based on age, disability, national origin, race, religion, sex and other protected characteristics. And employers may not punish workers for asserting their right to be free from employment discrimination. Examples of employee activities that are protected under Title VII of the Civil Rights Act of 1964 include:

- Opposing workplace discrimination or harassment.
- Complaining about alleged discrimination against the employee or co-workers.
- Threatening to complain.
- Refusing to obey an order reasonably believed to be discriminatory.
- Resisting sexual advances or intervening to protect others.
- Participating in an internal investigation.
- Participating in EEOC charge or lawsuit deposition as a witness.
- Refusing, as a supervisor, to carry out a management directive to discourage subordinates from filing complaints.

An employee may also claim retaliation under most other employment laws, such as the Americans with Disabilities Act, the Family and Medical Leave Act (FMLA), and the National Labor Relations Act.

Proving a Claim

Employers should note that disciplining an employee after exercising an employment right isn't enough for the worker to prove a retaliation claim. An employee claiming retaliation under Title VII, for example, must show:

• The employer knew that the employee engaged in protected activity.

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- The employer took adverse employment action (termination, demotion and failure to promote are examples of adverse action).
- There was a causal connection between the protected activity and the adverse employment action.
- The employee's protected activity was the "but for" cause of the adverse employment action (meaning that if the employee didn't engage in the protected activity, the adverse action would not have happened).

An employer may argue that the worker had ongoing performance issues or that a worker was fired because of the way he or she complained (rather than because he or she complained) by using abusive language or exhibiting threatening behavior. HR professionals should look for the following red flags when employees are disciplined:

- Suspicious timing.
- Suspicious verbal or written statements (including texts and e-mails).
- Similarly situated employees were treated differently.
- The reason given for action was not true or was inconsistent with company policy or common practice.
- Increased supervision or monitoring of a particular employee.
- Higher standards or expectations for a particular employee.

The policy should:

- Be well-publicized.
- Include multiple avenues to complain.
- Specify that complaints are treated confidentially to the extent possible.
- Make clear that all allegations of retaliation are taken seriously.

Timely and consistent discipline is also key, Howard said. Employers shouldn't wait to discipline employees or only find fault with some aspect of their employment after they make a complaint.



Chipotle cooks up bonus program for part-time workers

Chipotle Mexican Grill is known for offering part-time workers benefits such as tuition reimbursement, but the company's latest perk might be the guac on top of the burrito bowl. The restaurant chain announced Tuesday that its crews can earn up to a month's pay in annual bonuses.

To receive the bonus, Chipotle's 2,500 global locations need to meet sales and output goals as a team, according to a company statement. The benefit is offered quarterly; crews who qualify receive checks for an average week's worth of pay. Individual restaurants can potentially earn the bonus each quarter, and a month's worth of extra pay.

"Everyone should have the opportunity to celebrate success and be rewarded for their hard work," says Scott Scansen, Chipotle's senior director of total rewards. "Our new bonus structure is scaled so payout is based on average hours worked per week, which is fair and inclusive."

Chipotle's HR department issued the benefit to maintain the company's competitiveness in the food industry.

"At Chipotle, we're not only looking to compete for the industry's best, we're looking to keep the industry's best," Marissa Andrada, Chipotle's chief people officer, says in a statement. "Chipotle is about cultivating a better world, building a real community that works together to win together, and this bonus program provides a strategic investment in the people who make up the brand."

Chipotle will notify the first locations to receive the bonus at the end of the second quarter in July. The company's 70,000 global employees also have access to more than \$5,000 in annual college tuition reimbursements, free shift meals and free English as a second language classes for employees and their families.

"With current employment rates so low, today's workforce has options and can afford to be selective," Scansen says. "To remain competitive, Chipotle offers all employees best-in-class benefits and opportunities for growth, with a focus on development and promoting from within."

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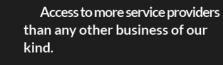
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