

**New Mexico Taxation & Revenue Department
Monthly Executive Dashboard as of January 31, 2015**

Office of the Secretary -	(505) 827-0341
Administrative Services -	(505) 827-0369
Audit and Compliance -	(505) 827-0900
Motor Vehicle -	(505) 827-2296
Property Tax -	(505) 827-0870
Revenue Processing -	(505) 827-0800
Tax Fraud Investigations -	(505) 841-6544

NMTRD Exec Staff: Secretary- Demesia Padilla, CPA **Deputy Secretary** - John Monforte **ASD** - Vacant
ITD – Jim Wastvedt **ACD** – Lizzy Vedamanikam **Hearings** - Monica Ontiveras **RPD** - Terry Rister
MVD – William Duran **PTD** - Caesario Quintana **General Counsel** – Brad Odell **TFID** - Alvan Romero

Audit & Compliance Division (ACD)		
Collections	January Amounts	YTD Amounts
Collections Goal	\$ 17,887,174	\$ 214,646,086
Actual Collections	17,891,518	\$ 133,107,054
Percent of Goal	100%	62%
Tax Credits (YTD Only)		
Number of Credits Completed		
Film Production Credit		26
High Wage Credit		49
Investment Credit		8
Technology Jobs Credit		16
Rural Jobs Credit		0
Advanced Energy Credit		0
Alternative Energy Credit		0
Total		99
Compliance		
	January Amounts /Counts	YTD Amounts/Counts
Refunds Stopped*	\$ 212,365	\$ 4,300,034
Bankruptcy Collections	\$ 422,872	\$ 4,421,882
Compliance Assessments	\$ 506,625	\$ 24,018,286
Bankruptcy Proofs #	33	282
PIT Project Notices #	639	12,441
Audits in Progress		
	January Amounts /Counts	YTD Amounts/Counts
# Rec'd for Review	33	504
# Assessed	36	492
Amount Assessed	\$ 2,048,982	\$ 44,564,574
Notes from ACD: The collections goal YTD is the annual goal for FY15. The snap shot of the YTD goal and collections would be collections goal of \$123,834,280 with actual collections of \$133,107,054 , which represents 107% of our goal.		

Financial Distribution Bureau (ASD) Fiscal Year 2015 Distribution						
Tax Categories	Current Month FY15	Last Year MTD FY14	FY15 YTD	FY14 YTD	YTD \$ Change	YTD % Change
Combined Reporting System	\$392,844,822	\$381,796,432	\$ 2,944,341,168	\$ 2,770,032,556	\$174,308,612	6%
Oil & Gas Taxes	107,964,769	123,033,090	808,052,674	720,924,684	87,127,991	12%
CFT/MVET/Weight Distance	51,386,246	45,392,702	388,972,671	369,885,074	19,087,597	5%
Personal Income Tax	38,960,960	19,592,971	245,651,941	230,710,664	14,941,276	6%
Corporate Income Tax	11,352,573	(3,842,476)	152,789,889	120,988,691	31,801,198	26%
Royalties from Leasing MVD Data	573,389	600,136	4,570,326	4,754,459	(184,133)	-4%
Other Programs	19,467,135	18,781,420	141,313,132	146,056,128	(4,742,997)	-3%
Total	\$622,549,894	\$585,354,274	\$ 4,685,691,799	\$ 4,363,352,255	\$322,339,544	7%

Tax Fraud Investigation Division (TFID)			
Original Entry Date	Case Description	Disposition	Disposition Date
1/15/2015	Tax Fraud/Tax Evasion	Special Agents and Forensic Auditors traveled the week of January 15, 2015 on an ongoing state tax investigation to the Southeastern Part of the state (Lovington, Hobbs, Carlsbad, Roswell, Artesia) to conduct interviews of taxpayers, who are witnesses, whose New Mexico personal state income tax returns were prepared by a tax return preparer. Returns contain excessive fraudulent	On-going
Audits Received & Approved	1. IA 14-115 Telecommunication Services 2. IA 14-106 Employee Off-Boarding Process		

Human Resources	
Description	Total
Work Orders YTD	1,465
FTE on TOOL	1,110
Filled Positions	928
Vacant Positions	182
Vacancy Rates	16%
Grievances Pending	1

Protest Office				
Activity	Total	Audit	Non-Audit	%Audit
Beginning Balance	437	74	363	16.93%
Protests Acknowledged	121	3	118	2.48%
Protests Closed	134	5	129	3.73%
Ending Inventory	424	72	352	16.98%
Ending Inventory Dollar Amount	\$ 177,461,707	\$84,202,847	\$ 93,258,860	47.45%
Formal Hearings Scheduled	Not Available			
Legal Working	334			
Inventory in Protest Office	90			

**New Mexico Taxation & Revenue Department
Monthly Executive Dashboard as of January 31, 2015**

Office of the Secretary -	(505) 827-0341
Administrative Services -	(505) 827-0369
Audit and Compliance -	(505) 827-0900
Motor Vehicle -	(505) 827-2296
Property Tax -	(505) 827-0870
Revenue Processing -	(505) 827-0800
Tax Fraud Investigations -	(505) 841-6544

NMTRD Exec Staff: Secretary- Demesia Padilla, CPA Deputy Secretary - John Monforte ASD - Vacant
 ITD – Jim Wastvedt ACD – Lizzy Vedamanikam Hearings - Monica Ontiveras RPD - Terry Rister
 MVD – William Duran PTD - Caesario Quintana General Counsel – Brad Odell TFID - Alvan Romero

Property Tax Division (PTD)				
Delinquent Property Tax Bureau	Goal	Actual Results	% of Goal	Goal Type
Delinquent Accounts Worked	12,000	240	2%	Cumulative
Scheduled Delinquent Tax Sales	33	2	6%	Statutory
Delinquent Tax Sales # Counties	33	1	3%	Cumulative
State Assessed Bureau				
Full Value of Assessed Properties	\$18,000,000,000	\$127,218	0%	Cumulative
Number Of Companies Reporting	600	15	3%	Cumulative
Returns Submitted/Completed	586	15	3%	Cumulative
Appraisal Bureau				
Assessor Evaluations Completed	33	0	0%	Cumulative
Appraisals/Reviews Performed	53	5	9%	Cumulative
No. of Counties - Scheduled Protest Hearings	25	0	0%	Cumulative

Personal Income Tax Results (PIT 2014)				
Returns Processed	January Counts	YTD Count	Exception Inventory	Exception %
Paper Returns	449	449		
E-filed Returns	72,058	72,058		
Total	72,507	72,507	3,249	4.48%
Refunds Issued				
	January Counts	January Amounts	YTD Counts	YTD Amounts
Paper Check	5,504	\$ 2,350,376	5,504	\$ 2,350,376
Direct Deposit	34,235	\$ 19,349,934	34,235	\$ 19,349,934
Total	39,739	\$ 21,700,310	39,739	\$ 21,700,310
Payments Received				
	January Counts	January Amounts	YTD Counts	YTD Amounts
Check	33,717	\$ 50,098,201	33,717	\$ 50,098,201
ACH	5,229	\$ 2,811,716	5,229	\$ 2,811,716
Total	38,946	\$ 52,909,917	38,946	\$ 52,909,917

Notes from RPD: Payments Received may include payments for multiple previous PIT tax years.

Motor Vehicle Division (MVD)	
Metric Measure	Results
Field Office Arrivals, Average Wait Time & Customer Satisfaction	
Customer Arrivals (total)	108,927
Average Wait Time	0:14:11
Customer Satisfaction (percentage good/excellent)	98.62%
Call Center Incoming Calls, Average abandon Rate, & Average Wait Time	
Calls Coming In (total)	71,384
Abandon Rate	38.39%
Average Wait Time	0:04:14
Customer Satisfaction Average (scale; 1-100; higher is better)	66.67%
Average Insured Rate	
Average Insured Rate	90.60%

Information Technology Division (ITD)		
Common Categories	HelpStar	GenTax
Open	79	583
New	1,608	130
Resolved	(1,529)	(160)
Net Total	158	553