



**New Mexico Taxation & Revenue Department
Monthly Executive Dashboard as of January 31, 2017**

NMTRD Exec Staff: Secretary- Vacant Acting Cabinet Secretary - John Monforte ACD – Ron Scott
 ITD – Mike Baca ASD – Vacant RPD – JoAnn Zuniga TFID – Vacant MVD – William Duran
 PTD - Vacant General Counsel – Diana Martwick

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

Human Resource (HR)	
Description	Total
Work Orders YTD	89
FTE on TOOL	1,086
Filled Positions	863
Vacant Positions	223
Vacancy Rate	21.0%
Grievances Pending	0

Tax Fraud Investigation Divisions (TFID)			
Original Entry Date	Case Description	Disposition	Disposition Date
January	Identity Theft/Computer Access with Intent to Defraud	A tax return preparer located in Albuquerque, NM was sentenced to 364 days in The Metropolitan Detention Center's Community Custody Program (CCP) followed by 5 years of supervised probation.	1/4/2017

Office of Internal Oversight (OIO)		
Description	January	YTD
Audits carry-over from FY	9	9
FY 2017 Assigned	0	11
Canceled	0	7
Completed	1	8
Status for Month End		
Assigned	0	
Background	0	
Work in progress	3	
Report stage	2	
Awaiting responses	0	
Total open audits:	5	
Other		
None		

Motor Vehicle Division (MVD)	
Metric Measure	Results
Field Office Arrivals, Average Wait Time & Customer Satisfaction	
Customer Arrivals (total)	128,624
Average Wait Time	0:24:00
Customer Satisfaction (percentage good/excellent)	98.39%
Call Center Incoming Calls, Average abandon Rate, & Average Wait Time	
Calls Coming In (total)	63,542
Abandon Rate	43.70%
Average Wait Time	0:04:04
Customer Satisfaction Average (scale; 1-100; higher is better)	66.20%
Average Insured Rate	
Average Insured Rate	89.19%

PROTEST OFFICE				
Activity	Total	Audit	Non-Audit	%Audit
Beginning Balance	431	119	312	27.61%
Protests Acknowledged	118	2	116	1.69%
Protests Closed	108	1	107	0.93%
Ending Inventory	441	120	321	27.21%
Ending Inventory Dollar Amount	\$121,335,776.07	\$81,870,826.08	\$39,464,949.99	67.47%

Audit & Compliance Division (ACD)		
Collections	January	YTD
Collections Goal*	\$18,951,742	\$ 227,420,905
Actual Collections	\$27,822,955	\$ 126,625,029
Percent of Goal	147%	56%

Tax Credits (YTD Only)	# Completed	Disallowed Amount
Film Production Credit	28	\$ 889,687
High Wage Credit	56	\$ 17,815,208
Investment Credit	8	\$ 214,986
Technology Jobs Credit	25	\$ 2,818,669
Rural Jobs Credit	7	\$ 642,603
Advanced Energy Credit	-	\$ -
Alternative Energy Credit	2	\$ 15,708
Total	126	\$ 22,396,861

Compliance	January	YTD
Refunds Denied	\$ 44,426	\$ 1,728,629
Bankruptcy Collections	\$ 712,537	\$ 3,084,131
Compliance Assessments	\$ 87,904	\$ 263,176
Bankruptcy Proofs #	74	343
PIT Project Notices #	1,662	11,012

Audits in Progress **	January	YTD
# Rec'd for Review	130	859
# Assessed	135	1,026
Amount Assessed	\$ 3,424,521	\$ 65,785,213

*The collections goal YTD is the annual goal for FY17. The snapshot of the YTD goal and collections would be, collections goal of \$135,577,847 with actual collections of \$126,625,029, which represents 93% of our goal.

**The Audits in Progress section only represents audits that have been reviewed by ATSS.

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Financial Distribution Bureau (ASD)						
Tax Program	MTD Distribution Amount	Last Year MTD Distribution Amount	YTD Distribution Amount	Last Year YTD Distribution Amount	YTD \$ Change Inc/(Dec)	YTD % Change
Combined Reporting System (GRT, etc)	382,112,336	383,733,651	2,821,022,513	2,844,026,939	(23,004,426)	-1%
Oil & Gas Taxes	68,589,656	67,990,582	388,240,245	511,111,471	(122,871,226)	-24%
CFT/MVET/Weight Distance Taxes	49,503,630	53,562,495	400,983,701	400,542,267	441,434	0%
Personal Income Tax	33,590,360	37,760,304	216,138,200	248,995,978	(32,857,778)	-13%
Corporate Income Tax	(8,429,185)	(3,628,512)	8,623,325	55,463,147	(46,839,822)	-84%
Royalties from Leasing MVD Data	536,782	595,911	4,312,704	4,762,622	(449,918)	-9%
Other programs	16,785,949	18,213,615	156,846,851	160,648,211	(3,801,360)	-2%
Total	542,689,528	558,228,045	3,996,167,540	4,225,550,636	(229,383,096)	-5%

Personal Income Tax Results (PIT 2016)					
Returns Processed	January 2017 Count	YTD Count	Current Exception Inventory	% of Returns Paper vs. E-File	Exception %
Paper Returns	532	532		17.9%	
E-filed Returns	2,438	2,438		82.1%	
Total	2,970	2,970	3,180		107.09%
Refunds Issued	January 2017 Count	January 2017 Amount	YTD Count	% of Returns Paper vs. E-File	YTD \$
Paper Check	10,942	\$4,317,268	10,942	9.8%	\$4,317,268
Direct Deposit	100,950	\$52,296,432	100,950	90.2%	\$52,296,432
Total	111,892	\$56,613,700	111,892		\$56,613,700
Payments Received**	January 2017 Count	January 2017 Amount	YTD Count	% of Returns Paper vs. E-File	YTD \$
Check	30,408	\$42,936,626	30,408	74.0%	\$42,936,626
ACH	6,655	\$6,254,390	6,655	26.0%	\$6,254,390
Total	37,063	\$49,191,016	37,063		\$49,191,016

Property Tax Division (PTD)				
Delinquent Taxes	Goal	Actual Results	% of Goal	Goal Type
Delinquent Accounts Worked	12,000	1,200	10%	Cumulative
Scheduled Delinquent Tax Sales	33	0	0%	Current
Delinquent Tax Sales # Counties	33	0	0%	Cumulative
State Assessed				
Full Value of Assessed Properties	\$18,000,000,000	\$0	0%	Cumulative
Number Of Companies Reporting	600	0	0%	Cumulative
Returns Submitted/Completed	565	0	0%	Cumulative
Appraisals				
Assessor Evaluations Completed	33	0	0%	Cumulative
Appraisals/Reviews Performed	65	6	9%	Cumulative
No. of Counties - Scheduled Protest Hearings	28	0	0%	Cumulative

Information Technology Division (ITD)		
Common Categories	Service Pro	GenTax
Open	81	465
New	162	99
Resolved	(927)	(111)
Net Total	1008	675