



**New Mexico Taxation & Revenue Department
Monthly Executive Dashboard – February 28, 2019**

NMTRD Exec Staff:
ITD—Mike Baca
MVD – Alicia Ortiz

Secretary—Stephanie S. Clarke
ASD— Vacant
PTD—Vacant

Deputy Secretary—Emily Oster
RPD—Vacant
General Counsel –Vacant

ACD – Vacant
TFID – Vacant

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

Audit & Compliance Division (ACD)		
Collections	Amounts	YTD Amounts
Collections Goal	\$ 20,589,623	\$ 247,075,471
Actual Collections	20,115,903	178,945,528
Percent of Goal	98%	72%
Performance Measures	February Percentages	Year-End Goal Percentages
Collections Against Prior Year Receivables	16.2%	28%
Collections Against Current Year Assessments	43%	65%
Compliance	February Amounts & Counts	YTD Amounts & Counts
Bankruptcy Collections	\$ 390,547	\$ 2,219,043
Bankruptcy Proofs #	63	414
Levy Recoveries	\$ 1,490,642	\$ 24,031,638
Audits in Progress	February Counts	YTD Counts
# Rec'd for Review	163	957
# Assessed	187	1,144
Amount Assessed	\$ 5,421,626	\$ 58,294,116

Note from ACD: This calculation is done on a quarterly basis. The measurement is from month ending Dec. 2018.

Tax Fraud Investigation Division (TFID)			
Original Entry Date	Case Description	Disposition	Disposition Date
February	Tax Evasion	An Anthony resident was indicted on four (4) counts of Tax Evasion in the 3rd Judicial District. After the indictment the resident immediately complied and paid back the tax owed of \$82,676.55 which included penalty and interest to the Taxation and Revenue Department.	Ongoing

Financial Distribution Bureau						
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)	\$ 364,213,680	\$ 522,342,393	\$ 3,926,861,893	\$3,666,212,375	\$260,649,518	7%
Oil & Gas Taxes	124,189,862	93,728,874	1,042,932,608	613,740,429	429,192,178	70%
CFT/MVET/Weight Distance Taxes	74,210,745	71,582,142	506,074,577	488,335,185	17,739,392	4%
Personal Income Tax	153,518,453	41,168,007	397,710,966	297,546,108	100,164,858	34%
Corporate Income Tax	29,540,673	9,089,349	128,976,996	40,241,479	88,735,517	221%
Royalties from Leasing MVD Data	623,840	540,101	5,040,271	4,860,675	179,596	4%
Other programs	32,262,963	22,394,191	190,372,762	174,273,002	16,099,760	9%
Total	\$ 778,560,216	\$ 760,845,057	\$ 6,197,970,073	\$5,285,209,254	\$912,760,819	17%

Protest Office					
Activity	Total	Application	Audit	Non-Audit	%Audit
Beginning Balance	610		171	439	28.03%
Number of Correspondance Received	116	170			
Protests Acknowledged	170		20	150	11.76%
Protests Closed	109		11	98	10.09%
Ending Inventory	706		169	537	23.94%
Ending Inventory Dollar Amount	\$ 537,915,649	170	\$ 99,419,554	\$ 438,496,095	18.48%
Formal Hearings Scheduled					Not Available
Legal Working-Atty. Assigned					395
Inventory in Protest Office					311

Information Technology Department (ITD)		
Common Categories	GenTax	Service Pro
Total in SQR on February 01, 2019	416	105
New for February 2019	40	1,543
Resolved during February	(262)	(1,297)
Total SQR's on February 28, 2019	194	351



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Personal Income Tax Results (PIT 2018)					
Returns Processed	February 2019	YTD Count	Current Exception Inventory	% of Returns Paper vs. E-File	Exception %
Paper Returns	11,229	11,229	0	2.9%	
E-filed Returns	340,513	374,494	0	97.1%	
Total	351,742	385,723	7,598	100.0%	1.97%
Refunds Issued	February 2019	Feb 2019 Amounts	YTD Count	% YTD	YTD \$
Paper Check	38,288	\$ 13,269,969	47,103	11.4%	\$ 16,853,487
Direct Deposit	267,763	132,094,755	365,255	88.6%	183,588,995
Total	306,051	145,364,724	412,358	100.0%	200,442,482
Payments Received	February 2019	Feb 2019 Amounts	YTD Count	% YTD	YTD \$
Check	9,331	\$ 6,459,143	39,469	68.7%	\$ 53,678,290
ACH	11,611	4,851,255	17,986	31.3%	11,553,654
Total	20,942	\$ 11,310,398	57,455	100.0%	\$ 65,231,945

Motor Vehicle Division (MVD)	
Metric Measure	Results
Field Office Arrivals, Average Wait Time & Customer Satisfaction	
Customer Arrivals (total)	128,121
Average Wait Time	0:15:19
Customer Satisfaction (percentage good/excellent)	98.26%
Call Center Incoming Calls, Average abandon Rate, & Average Wait Time	
Calls Coming In (total)	36369
Abandon Rate	45.89%
Average Wait Time	0:10:19
Customer Satisfaction Average (scale; 1-100; higher is better)	N/A
Average Insured Rate	
Average Insured Rate	90.14%

Office of Internal Oversight (OIO)		
Description	February	YTD
Internal Audit		
Audits carry-over from FY 2018	0	1
FY 2019 Audits Assigned	0	5
FY 2019 Special Projects Assigned	1	2
SP 19-102 Special Project for Procedures	10	19
Total YTD:		27
Closed or Canceled		
Internal Audits Completed	0	3
Canceled	0	1
Special Projects Completed	0	0
SP 19-102 Special Project for Procedures	1	1
Total Audits Completed or Canceled:		5
Audits - Status for Month End		
IA 19-101: Hold		1
IA 19-104: Hold		1
Total Audits Open:		2
Special Projects - Status for Month-End		
SP 19-101: Hold		1
SP 19-102: Open		18
SP 19-103: Open		1
Total Special Projects Open:		20

Property Tax Division (PTD)					
Delinquent Taxes	Goal	Results	% of Goal	Goal Type	
Delinquent Accounts Worked	12,000	2,050	17%	Cumulative	
Scheduled Delinquent Tax Sales	33	5	15%	Current	
Delinquent Tax Sales Held # Counties	33	0	0%	Cumulative	
State Assessed					
Full Value of Assessed Properties	\$ 18,000,000,000	\$ 1	0%	Cumulative	
Number Of Companies Reporting	600	1	0%	Cumulative	
Returns Submitted/Completed	600	1	0%	Cumulative	
Appraisals					
Draft Assessor Evaluations Completed	33	0	0%	Cumulative	
Assessor Evaluations Completed	33	0	0%	Cumulative	
Appraisals/Reviews Performed	50	21	42%	Cumulative	
Number of Protest Hearings Heard Est.	275	170	62%	Cumulative	