

**Monthly Executive Dashboard
APRIL 30, 2020**

N M T R D E X E C U T I V E S T A F F

Secretary, Stephanie Schardin Clarke
Deputy Secretary, Emily Oster
Chief Legal Counsel, Tim Van Valen

ACD/Aysha Mora
ASD/Denise Irion

ITD/Mike Baca
MVD/Marcos Martinez

PTD/Michael O'Melia
RPD/Charlene Trujillo
TFID/Vince Mares

Office of the Secretary 505-827-0341
Audit and Compliance 505-827-2727
Administrative Services 505-827-0369
Motor Vehicle 505-827-2296
Property Tax 505-476-3092
Revenue Processing 505-827-0800
Tax Fraud Investigations 505-841-5578

PROTEST OFFICE					
Activity		Total	Audit	Non-Audit	%Audit
Beginning Balance	////	854	303	551	35%
Number of Protests Received	////	144	13	131	9%
Informal Conference Requested	////	0	0	0	0%
Protest Deficient	////	2	2	0	100%
Protests Acknowledged	////	25	11	14	44%
Protests Acknowledged/Closed	////	73	5	68	7%
Protests Closed	////	46	12	34	26%
Protest Invalid	////	23	3	20	13%
Ending Inventory	A	888	297	591	33%
Ending Inventory Dollar Amount	B	\$569,183,051	\$131,440,453	\$437,742,598	23%
Legal Working-Atty. Assigned		345			
Legal (Case waiting on Decision from the hearing and/or courts)	C	219			
Inventory in Protest Office	D=A-(B-C)	762			

INFORMATION TECHNOLOGY DIVISION (ITD)			
ServicePro Common Categories		GenTax	
Beginning	355	Total in SQR on 04/01/20	162
Open	1,965	New	48
Resolved	1,770	Resolved	36
Net Total	195	Total SQRs on 04/30/20	174

PERSONAL INCOME TAX (RPD)
TAX FRAUD INVESTIGATION DIVISION (TFID)
No data at time of publication.

OFFICE OF INTERNAL OVERSIGHT (OIO)		
INTERNAL AUDIT		
Description	April	YTD
Audits & Special Project carry-over from FY 2019	////	2
FY 2020 Internal Audits Assigned	11	29
Procedures Assigned	1	41
Revised Procedures	1	2
Total YTD:		74
Completed - Audit and Special Projects (Audit Plan)		
Internal Audits Completed	12	27
Subtotal:		27
Completed Procedures		
Completed	4	23
Revised Procedures Completed	1	2
Subtotal:		25
Total Completed:		52
Status for Month End - Audits & Special Projects (Audit Plan)		
SP 19-101: On-Hold	////	1
FY 2020 Audits: Fieldwork	////	1
FY 2020 Audits: Report-Draft	////	2
Total Open or On-Hold:		4
Status for Month End - Procedures		
Open	////	15
Pending	////	1
On-Hold	////	2
Total Procedures Open, On-Hold, or Pending:		18
Completed, Open, On-Hold, or Pending Total YTD:		74

ASD FINANCIAL DISTRIBUTION BUREAU (FDB)						
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)	\$279,022,549	\$146,902,661	\$4,691,723,288	\$4,293,195,958	\$398,527,330	9%
Oil & Gas Taxes	\$157,828,087	\$115,075,922	\$1,492,371,563	\$1,270,243,710	\$222,127,852	17%
CFT/MVET/Weight Distance Taxes	\$54,510,426	\$57,798,193	\$664,163,406	\$616,402,268	\$47,761,138	8%
Personal Income Tax	\$226,290,260	\$336,817,836	\$1,008,418,574	\$941,450,426	\$66,968,148	7%
Corporate Income Tax	\$19,840,072	\$3,090,442	(\$80,392,719)	\$123,236,876	(\$203,629,595)	-165%
Royalties from Leasing MVD Data	\$635,276	\$638,749	\$6,286,781	\$6,341,118	(\$54,337)	-1%
Other programs	\$23,792,951	\$14,464,203	\$305,844,207	\$220,364,711	\$85,479,496	39%
TOTAL:	\$761,919,622	\$674,788,006	\$8,088,415,100	\$7,471,235,068	\$617,180,033	8%
The (\$203,629.59) is primarily due to Film Credit (FC) refunds. Per SB 2, the FC backlog claimed was to be paid in FY2019. FC is a General Fund (GF) sourced credit, which is why it negatively impacted the GF Corporate Income Tax Distribution.						

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AUDIT AND COMPLIANCE DIVISION (ACD)		
Collections	April	Fiscal YTD
Collections Goal	\$20,897,507	\$208,975,072
Actual Collections	\$17,611,547	\$214,281,546
Percent of Goal	84%	103%
Performance Measures	April	Fiscal Year-End Goal
Collections Against Prior Year Receivables	18%	23%
Collections Against Current Year Assessments	23%	65%
Compliance	April	Fiscal YTD
Bankruptcy Collections	\$238,160	\$2,604,590
Bankruptcy Proofs #	50	552
Levy Recoveries	\$892,396	\$11,918,752
Audits in Progress	April	Fiscal YTD
# Received for Review	215	2,223
# Assessed	216	2,410
Amount Assessed	\$4,126,028	\$51,659,395

MOTOR VEHICLE DIVISION (MVD)	
Metric Measure	Results
Field Office Arrivals, Average Wait Time and Customer Satisfaction	
Customer Arrivals (total)	offices closed
Average Wait Time	offices closed
Customer Satisfaction (percentage good/excellent)	offices closed
Call Center Incoming Calls, Average abandon Rate and Average Wait Time	
Calls Coming In (total)	134,661
Abandon Rate	88%
Average Wait Time	0:14:32
Customer Satisfaction Average (scale; 1-100; higher is better)	NA
Average Insured Rate	
Average Insured Rate	91%

PROPERTY TAX DIVISION (PTD)				
Delinquent Taxes	Goal	Actual Results	% of Goal	Goal Type
Delinquent Accounts Worked	10,000	1,711	17%	Cumulative
Scheduled Delinquent Tax Sales	33	0	0%	Current
Delinquent Tax Sales Held # Counties	33	0	0%	Cumulative
State Assessed				
Full Value of Assessed Properties	\$20,000,000,000	\$6,891,420,087	34%	Cumulative
Number Of Companies Reporting	600	553	92%	Cumulative
Returns Submitted/Completed	600	244	41%	Cumulative
Appraisals				
Draft Assessor Evaluations Completed	33	16	48%	Cumulative
Assessor Evaluations Completed	33	0	0%	Cumulative
Appraisals/Reviews Performed	50	34	68%	Cumulative
Number of Protest Hearings Heard	225	5	2%	Cumulative