



**New Mexico Taxation & Revenue Department  
Monthly Executive Dashboard as of September 30, 2018**

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:**  
**ITD**—Mike Baca  
**MVD** – Alicia Ortiz (Acting)

**Secretary**—John Monforte (Acting)  
**ASD**— JoAnn Chavez (Acting)  
**PTD**—Michael O’Melia (Acting)

**Deputy Secretary**—Vacant  
**RPD**—Charlene Trujillo (Acting)  
**General Counsel** —Tonya Herring (Acting)

**ACD** – Shawn Marris (Acting)  
**TFID** – Lilia Ruiz (Acting)

Audit & Compliance Division (ACD)		
Collections	September Amounts	YTD Amounts
Collections Goal	\$ 20,589,623	\$ 247,075,471
Actual Collections	19,527,124	72,180,479
Percent of Goal	95%	29%
Performance Measures	September Percentage	Year-End Goal Percentage
Collections Against Prior Year Receivables	10.3%	28%
Compliance	September Amounts & Counts	YTD Amounts & Counts
Bankruptcy Collections	\$ 235,016	\$ 451,028
Bankruptcy Proofs #	45	163
Levy Recoveries	\$ 3,249,538	\$ 7,824,188
Audits in Progress	September Counts	YTD Count
# Rec'd for Review	65	206
# Assessed	95	311
Amount Assessed	\$ 6,986,438	\$ 19,347,199

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)	\$ 511,927,076	\$ 449,051,570	\$ 1,539,142,332	\$ 1,354,633,435	\$ 184,508,897	14%
Oil & Gas Taxes	110,162,966	63,681,457	376,014,808	207,961,023	168,053,785	81%
CFT/MVET/Weight Distance Taxes	58,475,881	58,428,044	188,216,650	185,283,870	2,932,780	2%
Personal Income Tax	18,774,744	16,165,998	104,609,990	93,374,235	11,235,754	12%
Corporate Income Tax	6,293,843	8,723,136	40,682,245	24,828,353	15,853,892	64%
Royalties from Leasing MVD Data	655,497	608,099	1,889,611	1,842,494	47,117	3%
Other programs	17,092,154	17,168,702	65,073,373	60,814,566	4,258,806	7%
<b>Total</b>	<b>\$ 723,382,161</b>	<b>\$ 613,827,005</b>	<b>\$ 2,315,629,008</b>	<b>\$ 1,928,737,977</b>	<b>\$ 386,891,031</b>	<b>20%</b>

Information Technology Division (ITD)		
Common Categories	Service Pro	GenTax
Beginning SQRs	113	513
New in September	1,424	79
Resolved	(1,205)	(77)
<b>Net Ending SQRs</b>	<b>332</b>	<b>515</b>

Property Tax Division (PTD)				
Delinquent Taxes	Goal	Actual Results	% of Goal	Goal Type
Delinquent Accounts Worked	12,000	9,971	83%	Cumulative
Scheduled Delinquent Tax Sales	33	35	106%	Current
<b>Delinquent Tax Sales Held # Counties</b>	<b>33</b>	<b>24</b>	<b>73%</b>	<b>Cumulative</b>
State Assessed				
<b>Full Value of Assessed Properties</b>	<b>\$ 18,000,000,000</b>	<b>\$ 21,639,253,050</b>	<b>120%</b>	<b>Cumulative</b>
Number Of Companies Reporting	600	574	96%	Cumulative
Returns Submitted/Completed	523	574	110%	Cumulative
Appraisals				
Draft Assessor Evaluations Completed	33	32	97%	Cumulative
Assessor Evaluations Completed	33	32	97%	Cumulative
Appraisals/Reviews Performed	50	49	98%	Cumulative
<b>Number of Protest Hearings Heard</b>	<b>275</b>	<b>129</b>	<b>47%</b>	<b>Cumulative</b>

Tax Fraud Investigation Division (TFID)			
Original Entry Date	Case Description	Disposition	Disposition Date
September 2018	Tax Fraud	An Albuquerque resident was referred for prosecution for Tax Fraud and computer access with the intent to defraud or embezzle.	Ongoing
September 2018	Tax Evasion	An Albuquerque resident was indicted on one (1) second degree felony count embezzlement and one (1) fourth degree felony count Tax Evasion.	Ongoing



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Return Processing Division (RPD) - PIT 2017					
Returns Processed	September Counts	YTD Counts	Current Exception Inventory	% of Returns Paper vs. E-File	Exception %
Paper Returns	1,029	66,069	-	7.6%	
E-filed Returns	6,987	800,596	-	92.4%	
<b>Total</b>	<b>8,016</b>	<b>866,665</b>	<b>5,621</b>	<b>100.0%</b>	<b>0.65%</b>
Refunds Issued	September Counts	September Amounts	YTD Counts	% YTD	YTD Amounts
Paper Check	140,667	\$ 54,446,410	872,624	19.0%	\$ 317,112,390
Direct Deposit	521,356	266,513,248	3,723,369	81.0%	1,881,798,784
<b>Total</b>	<b>662,023</b>	<b>\$ 320,959,658</b>	<b>4,595,993</b>	<b>100.0%</b>	<b>\$ 2,198,911,174</b>
Payments Received	September Count	September Amounts	YTD Counts	% YTD	YTD Amounts
Check	33,743	\$ 47,361,904	277,136	71.0%	\$ 337,016,689
ACH	6,749	6,958,728	113,115	29.0%	76,490,227
<b>Total</b>	<b>40,492</b>	<b>\$ 54,320,632</b>	<b>390,251</b>	<b>100.0%</b>	<b>\$ 413,506,916</b>

**Notes from RPD:** Payments received may be for multiple tax years.

Motor Vehicle Division (MVD)	
Metric Measure	Results
<b>Field Office Arrivals, Average Wait Time &amp; Customer Satisfaction</b>	
Customer Arrivals (total)	119,235
Average Wait Time	0:15:23
Customer Satisfaction (percentage good/excellent)	98.18%
<b>Call Center Incoming Calls, Average abandon Rate, &amp; Average Wait Time</b>	
Calls Coming In (total)	44941
Abandon Rate	-
Average Wait Time	-
Customer Satisfaction Average (scale; 1-100; higher is better)	-
<b>Average Insured Rate</b>	
Average Insured Rate	90.10%

Protest Office				
Activity	Total	Audit	Non-Audit	%Audit
Beginning Balance	590	108	482	18.31%
Protests Acknowledged	82	5	77	6.10%
Protests Closed	55	4	51	7.27%
Ending Inventory	617	109	508	17.67%
<b>Ending Inventory Dollar Amount</b>	<b>\$ 152,324,240</b>	<b>\$ 95,666,195</b>	<b>\$ 56,658,045</b>	<b>62.80%</b>
Formal Hearings Scheduled	Not Available			
Legal Working	469			
Inventory in Protest Office	148			

Office of Internal Oversight (OIO)		
Description	September Counts	YTD
<b>Internal Audit</b>		
Audits carry-over from FY 2018	0	1
FY 2019 Audits Assigned	2	4
FY 2019 Special Projects Assigned	0	1
Canceled	0	0
<b>Subtotal</b>	<b>2</b>	<b>6</b>
Internal Audits Completed	0	1
Special Projects Completed	0	0
<b>Audits - Status for Month End</b>		
Open		0
Fieldwork		1
Report-Draft stage		2
Awaiting responses		1
On-Hold		1
<b>Total Open Audits</b>		<b>5</b>
<b>Special Projects - Status for Month-End</b>		
Open		0
Fieldwork		0
Report-Draft stage		1
Awaiting responses		0
On-Hold		0
<b>Special Projects Open</b>		<b>1</b>