



**New Mexico Taxation & Revenue Department
Monthly Executive Dashboard as of July 31, 2016**

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 ACD – Ron Scott
 ITD – Michael Baca ASD – Vacant RPD – JoAnn Zuniga TFID – Vacant
 MVD – William Duran PTD - Vacant General Counsel – Diana Martwick

Audit & Compliance Division (ACD)		
Collections	July	YTD
Collections Goal	\$ 18,951,742	\$ 227,420,905
Actual Collections		
Percent of Goal	0%	0%
Tax Credits (YTD Only)		
Number of Credits Granted		
Film Production Credit		4
High Wage Credit		5
Investment Credit		1
Technology Jobs Credit		4
Rural Jobs Credit		0
Advanced Energy Credit		0
Alternative Energy Credit		0
Total		14
Compliance	July Amounts/Counts	YTD Amounts/Counts
Refunds Denied	\$ 371,163	\$ 371,163
Bankruptcy Collections	\$ 552,077	\$ 552,077
Compliance Assessments	\$ 18,992	\$ 18,992
Bankruptcy Proofs #	39	39
PIT Project Notices #	1,792	1,792
Audits in Progress		
July		
YTD		
# Rec'd for Review	96	96
# Assessed	109	109
Amount Assessed	\$ 5,587,645	\$ 5,587,645
This is an approximation of the collection goal. The figure is still being set.		
No data has been compiled since there has been no collection goal set.		

Financial Distribution Bureau (FDB)						
Tax Program	MTD Distribution Amount	Last Year MTD Distribution Amount	YTD Distribution Amount	Last Year YTD Distribution Amount	YTD \$ Change	YTD % Change
Combined Reporting System (GRT, etc)	365,849,692	385,780,227	365,849,692	385,780,227	(19,930,535)	-5%
Oil & Gas Taxes	46,903,129	66,221,719	46,903,129	66,221,719	(19,318,590)	-29%
CFT/MVET/Weight Distance Taxes	51,185,286	48,343,022	51,185,286	48,343,022	2,842,264	6%
Personal Income Tax	56,281,560	72,343,315	56,281,560	72,343,315	(16,061,755)	-22%
Corporate Income Tax	(17,637,696)	(3,047,462)	(17,637,696)	(3,047,462)	(14,590,234)	479%
Royalties from Leasing MVD Data	708,791	615,889	708,791	615,889	92,901	15%
Other programs	26,734,052	23,596,819	26,734,052	23,596,819	3,137,233	13%
Total	530,024,814	593,853,529	530,024,814	593,853,529	(63,828,716)	-11%

Information Technology Division (ITD)		
Common Categories	Service Pro	GenTax
Open	86	389
New	1118	64
Resolved	1032	65
Net Total	1118	388

Human Resource (HR)	
Description	Total
Work Orders YTD	894
FTE on TOOL	1,099
Filled Positions	869
Vacant Positions	230
Vacancy Rate	26.0%
Grievances Pending	1

Tax Fraud Investigation Divisions (TFID)			
Original Entry Date	Case Description	Disposition	Disposition Date
July	Tax Fraud	A former tax preparer from Roswell, NM plead no contest to 1 count of racketeering, 26 counts of tax fraud, and 8 counts of fraud and was sentenced on July 11, 2016 to 18 months prison time and restitution in the amount of \$38,513 paid to the 28 taxpayers who were declared victims of fraudulent filings.	Ongoing
Personnel	Turnover this month include a Special Agent in the Tax Fraud Bureau and the Administrative Assistant. Both transferred to other state agencies		

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Motor Vehicle Division (MVD)	
Metric Measure	Results
Field Office Arrivals, Average Wait Time & Customer Satisfaction	
Customer Arrivals (total)	117,873
Average Wait Time	0:13:05
Customer Satisfaction (percentage good/excellent)	98.69%
Call Center Incoming Calls, Average abandon Rate, & Average Wait Time	
Calls Coming In (total)	70348
Abandon Rate	55.80%
Average Wait Time	0:08:54
Customer Satisfaction Average (scale; 1-100; higher)	59.80%
Average Insured Rate	
Average Insured Rate	91.67%

Office of Internal Oversight (OIO)		
Description	July	YTD
Audits carry-over from FY 2016	9	9
FY 2017 Assigned	6	6
Canceled	0	0
Completed	5	5
Status for Month End		
Assigned	6	
Background	1	
Work in progress	1	
Report stage	0	
Awaiting responses	3	
Total open audits:	11	
Other		
None		

Personal Income Tax Results (PIT 2015)					
Returns Processed	July 2016 Count	YTD Count	Current Exception Inventory	% of Returns Paper vs. E-File	Exception %
Paper Returns	1,710	188,402		10.6%	
E-filed Returns	5,130	1,581,714		89.4%	
Total	6,840	1,770,116	5,275		0.30%
Refunds Issued	July 2016 Count	YTD Count	YTD Count	% of Returns Paper vs. E-File	YTD \$
Paper Check	6,012	\$3,203,778	156,623	24.0%	\$57,369,558
Direct Deposit	3,832	\$3,459,206	496,063	76.0%	\$242,917,061
Total	9,844	\$6,662,984	652,686		\$300,286,619
Payments Received	July 2016 Count	YTD Count	YTD Count	% of Returns Paper vs. E-File	YTD \$
Check	8,282	\$6,305,237	231,943	72.6%	\$255,921,812
ACH	4,062	\$1,360,651	87,565	27.4%	\$50,614,514
Total	12,344	\$7,665,888	319,508		\$306,536,326

Property Tax Division (PTD) July 2016				
Delinquent Taxes	Goal	Actual Results	% of Goal	Goal Type
Delinquent Accounts Worked	12,000	1,459	12%	FY17
Scheduled Delinquent Tax Sales	33	25	76%	Cumulative
Delinquent Tax Sales # Counties	33	25	76%	Cumulative
State Assessed				
Full Value of Assessed Properties	\$18,000,000,000	\$20,000,000,000	111%	Cumulative
Number Of Companies Reporting	600	580	97%	Cumulative
Returns Submitted/Completed	565	575	102%	Cumulative
Appraisals				
Assessor Evaluations Completed	33	33	100%	Cumulative
Appraisals/Reviews Performed	60	46	77%	Cumulative
No. of Counties - Scheduled Protest Hearings	28	20	71%	Cumulative

PROTEST OFFICE				
Activity	Total	Audit	Non-Audit	% Audit
Beginning Balance (7/1/16)	438	101	337	23.06%
Protests Acknowledged	138	4	134	2.90%
Protests Closed	146	4	142	2.74%
Ending Inventory	430	101	329	23.49%
Ending Inventory Dollar Amount	\$99,825,042	\$61,953,041	\$37,872,001	62.06%
Formal Hearings Scheduled	Not Available			
Legal Working	421			
Inventory in Protest Office	9			