



**New Mexico Taxation & Revenue Department
Monthly Executive Dashboard as of March 31, 2018**

NMTRD Exec Staff: Secretary- Vacant Acting Cabinet Secretary - John Monforte ACD – Ron Scott
 ITD – Mike Baca Acting ASD – Jo Ann Chavez RPD – JoAnn Zuniga Acting TFID – Lilia Ruiz
 Acting MVD – Alicia Ortiz Acting PTD – Bryson Frazier General Counsel – Tonya Herring

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	March	YTD
Collections Goal *	\$ 19,079,405	\$ 228,952,858
Actual Collections	\$ 20,134,109	\$ 181,928,027
Percent of Goal	106%	79%
Tax Credits (YTD Only)	# Completed	Disallowed Amount
Film Production Credit	62	\$ 2,373,656
High Wage Credit	14	\$ 929,749
Investment Credit	16	\$ 195,501
Technology Jobs Credit	26	\$ 5,527,359
Rural Jobs Credit	9	\$ 336,724
Advanced Energy Credit	-	\$ -
Alternative Energy Credit	1	\$ -
Total	128	\$ 9,362,989
Compliance	March	YTD
Bankruptcy Collections	\$ 87,163	\$ 994,032
PIT Assessments	\$ 74,837	\$ 1,070,789
Bankruptcy Proofs #	37	452
PIT Project/ QRU Notices #	14,046	40,340
Audits in Progress **	March	YTD
# Rec'd for Review	79	778
# Assessed	94	1,122
Amount Assessed	\$ 19,205,519	\$ 70,688,627
*The collections goal YTD is the annual goal for FY18. The snapshot of the YTD goal and collections would be, collections goal of \$167,311,704 with actual collections of \$181,928,027 which represents 109% of our goal.		
**The Audits in Progress section only represents audits that have been reviewed by ATSS.		

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)	440,131,845	387,684,624	4,106,344,219	3,696,870,420	409,473,800	11%
Oil & Gas Taxes	92,944,095	72,521,481	706,684,525	527,318,888	179,365,637	34%
CFT/MVET/Weight Distance Taxes	49,838,926	49,040,260	538,174,111	520,527,401	17,646,710	3%
Personal Income Tax	29,908,483	16,362,623	327,454,591	276,758,051	50,696,540	18%
Corporate Income Tax	6,000,747	1,026,876	46,242,227	27,901,520	18,340,707	66%
Royalties from Leasing MVD Data	660,532	644,406	5,521,208	5,523,307	(2,099)	0%
Other programs	15,306,010	14,119,529	189,579,012	192,897,702	(3,318,690)	-2%
Total	634,790,639	541,399,798	5,919,999,893	5,247,797,288	672,202,605	13%

Motor Vehicle Division (MVD)	
Metric Measure	Results
Field Office Arrivals, Average Wait Time & Customer Satisfaction	
Customer Arrivals (total)	130,077
Average Wait Time	0:19:33
Customer Satisfaction (percentage good/excellent)	98.36%
Call Center Incoming Calls, Average abandon Rate, & Average Wait Time	
Calls Coming In (total)	83,865
Abandon Rate	-
Average Wait Time	-
Customer Satisfaction Average (scale; 1-100; higher is better)	-
Average Insured Rate	
Average Insured Rate	90.04%

Office of Internal Oversight (OIO)		
Description	March	YTD
Audits carry-over from FY 20		6
FY 2018 Assigned	2	28
Canceled	0	1
Internal Audits Completed	7	21
Special Projects Completed	1	1
Audits - Status for Month End		
Open		0
Fieldwork		1
Report stage		2
Awaiting responses		4
Total open audits:		7
Special Project Audits - Status Month End		
Fieldwork		1
Awaiting responses		1
Final Report prep for distribution		2
Special Projects Open:		4

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PROTEST OFFICE				
Activity	Total	Audit	Non-Audit	%Audit
Beginning Balance	534	103	431	19.29%
Protests Acknowledged	62	3	59	4.84%
Protests Closed	69	3	66	4.35%
Ending Inventory	527	103	424	19.54%
Ending Inventory Dollar Amount	\$150,675,890.82	\$91,068,926.78	\$59,606,964.04	60.44%
Formal Hearings Scheduled	Not Available			
Legal Working	435			
Inventory in Protest Office	92			

Property Tax Division (PTD)				
Delinquent Taxes	Goal	Actual Results	% of Goal	Goal Type
Delinquent Accounts Worked	12,000	5,662	47%	Cumulative
Scheduled Delinquent Tax Sales	33	8	24%	Current
Delinquent Tax Sales Held # Counties	33	0	0%	Cumulative
State Assessed				
Full Value of Assessed Properties	\$18,000,000,000	\$1,402,790,225	8%	Cumulative
Number Of Companies Reporting	600	523	87%	Cumulative
Returns Submitted/Completed	523	250	48%	Cumulative
Appraisals				
Draft Assessor Evaluations Completed	33	3	9%	Cumulative
Assessor Evaluations Completed	33	0	0%	Cumulative
Appraisals/Reviews Performed	65	16	25%	Cumulative
No. of Counties - Scheduled Protest Hearings	28	2	7%	Cumulative

Tax Fraud Investigation Division (TFID)			
Original Entry Date	Case Description	Disposition	Disposition Date
March	Embezzlement/ Tax Fraud	An Albuquerque resident plead guilty to one (1) count of Embezzlement and three (3) counts of Tax Evasion.	Closed
March	Tax Fraud	A case recommending prosecution of an Albuquerque resident was accepted into the DA's Pre Prosecution Diversion Program. The individual will pay back over \$34,000 in restitution to the state of New Mexico	Ongoing

No stats reported from IT

Personal Income Tax Results (PIT 2017)					
Returns Processed	Mar 2018 Count	Mar 2018 Count YTD	Current Exception Inventory	% of Returns Paper vs. E-File	Exception %
Paper Returns	25,413	34,486	-	6.0%	
E-filed Returns	180,296	537,950	-	94.0%	
Total	205,709	572,436	15,454		2.70%
Refunds Issued	Mar 2018 Count	Mar 2018 \$	YTD Count	% YTD	YTD \$
Paper Check	66,588	\$23,241,638	101,801	13.2%	\$35,770,032
Direct Deposit	382,318	\$193,869,865	666,981	86.8%	\$341,889,376
Total	448,906	\$217,111,503	768,782		\$377,659,408
Payments Received**	Mar 2018 Count	Mar 2018 \$	YTD Count	% YTD	YTD \$
Check	24,402	\$17,091,427	62,515	67.9%	\$78,263,279
ACH	13,178	\$5,778,565	29,562	32.1%	\$18,576,591
Total	37,580	\$22,869,992	92,077		\$96,839,871