



**New Mexico Taxation & Revenue Department
Monthly Executive Dashboard as of July 31, 2017**

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- Vacant Acting Cabinet Secretary - John Monforte ACD – Ron Scott
 ITD – Mike Baca ASD – Vacant RPD – JoAnn Zuniga TFID – Vacant
 MVD – William Duran PTD - Vacant General Counsel – Tonya Herring

PROTEST OFFICE				
Activity	Total	Audit	Non-Audit	%Audit
Beginning Balance	511	121	390	23.68%
Protests Acknowledged	200	10	190	5.00%
Protests Closed	146	5	141	3.42%
Ending Inventory	565	126	439	22.30%
Ending Inventory Dollar Amount	\$159,219,785.00	\$87,919,540.00	\$71,300,245.00	55.22%

Human Resource (HR)	
Description	Total
Work Orders YTD	702
FTE on TOOL	1,013
Filled Positions	783
Vacant Positions	230
Vacancy Rate	23.0%
Grievances Pending	0

Audit & Compliance Division (ACD)		
Collections	July	YTD
Collections Goal *	\$ 16,773,103	\$ 218,050,341
Actual Collections	\$ 19,436,234	\$ 19,436,234
Percent of Goal	116%	9%
Tax Credits (YTD Only)		
# Completed	Disallowed Amount	
Film Production Credit	6	\$ 47,700
High Wage Credit	2	\$ 8,122
Investment Credit	1	\$ 22,908
Technology Jobs Credit	2	\$ 89,829
Rural Jobs Credit	1	\$ 230,908
Advanced Energy Credit		\$
Alternative Energy Credit		\$
Total	12	\$ 399,466
Compliance		
	July	YTD
Bankruptcy Collections	\$ 152,147	\$ 152,147
PIT Assessments	\$ 151,181	\$ 151,181
Bankruptcy Proofs #	39	39
PIT Project/ QRU Notices #	2,477	2,477
Audits in Progress **		
	July	YTD
# Rec'd for Review	118	118
# Assessed	228	228
Amount Assessed	\$2,564,153.35	\$ 2,564,153.35

*The collections goal YTD is the annual goal for FY18. The snapshot of the YTD goal and collections would be, collections goal of \$16,773,103 with actual collections of \$19,436,234 which represents 116% of our goal.

**The Audits in Progress section only represents audits that have been reviewed by ATSS.

Information Technology Division (IT)		
Common Categories	GenTax	Service Pro
Open	365	165
New	79	148
Resolved	82	1218
Net Total	362	1383

Property Tax Division (PTD)				
Delinquent Taxes	Goal	Actual Results	% of Goal	Goal Type
Delinquent Accounts Worked	12,000	11,092	92%	Cumulative
Scheduled Delinquent Tax Sales	33	22	67%	Current
Delinquent Tax Sales # Counties	33	16	48%	Cumulative
State Assessed				
Full Value of Assessed Properties	\$18,000,000,000	\$20,237,669,475	112%	Cumulative
Number Of Companies Reporting	600	561	94%	Cumulative
Returns Submitted/Completed	573	556	97%	Cumulative
Appraisals				
Assessor Evaluations Completed	33	33	100%	Cumulative
Appraisals/Reviews Performed	65	30	46%	Cumulative
No. of Counties - Scheduled Protest Hearings	28	16	57%	Cumulative

Tax Fraud Investigation Divisions (TFID)			
Original Entry Date	Case Description	Disposition	Disposition Date
July	Tax Fraud/Embezzlement	A Corrales man plead guilty to one (1) count of Tax Fraud (\$2,500, but not more than \$20,000) and one (1) count of Embezzlement (over \$20,000) in the Thirteenth Judicial District Court on July 20, 2017. He will be sentenced at a date not yet determined.	Ongoing

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Personal Income Tax Results (PIT 2016)					
Returns Processed	July 2017 Count	July 2017 Count YTD	Current Exception Inventory	% of Returns Paper vs. E-File	Exception %
Paper Returns	1,010	79,066	-	10.1%	
E-filed Returns	4,912	700,443	-	89.9%	
Total	5,922	779,509	19,210		2.46%
Refunds Issued	July 2017 Count	July 2017 \$	YTD Count	% of Returns Paper vs. E-File	YTD \$
Paper Check	141,797	\$52,586,997	663,784	19.2%	\$231,457,556
Direct Deposit	511,393	\$250,015,384	2,785,172	80.8%	\$1,335,630,574
Total	653,190	\$302,602,380	3,448,956		\$1,567,088,130
Payments Received**	July 2017 Count	July 2017 \$	YTD Count	% of Returns Paper vs. E-File	YTD \$
Check	8,455	\$5,157,956	496,762	71.1%	\$264,957,392
ACH	3,413	\$2,206,951	202,285	28.9%	\$57,312,770
Total	11,868	\$7,364,907	699,047		\$322,270,163

Office of Internal Oversight (OIO)		
Description	July	YTD
Audits carry-over from FY 2017	6	6
FY 2017 Assigned	3	3
Canceled	0	0
Completed	3	3
Status for Month End		
Assigned	0	
Background	2	
Fieldwork	1	
Report stage	3	
Awaiting responses	0	
Other		
None		

Motor Vehicle Division (MVD)	
Metric Measure	Results
Field Office Arrivals, Average Wait Time & Customer Satisfaction	
Customer Arrivals (total)	122,153
Average Wait Time	0:29:57
Customer Satisfaction (percentage good/excellent)	97.13%
Call Center Incoming Calls, Average abandon Rate, & Average Wait Time	
Calls Coming In (total)	60,674
Abandon Rate	42.12%
Average Wait Time	0:04:09
Customer Satisfaction Average (scale; 1-100; higher is better)	67.78%
Average Insured Rate	
Average Insured Rate	87.29%

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)	428,976,479	365,849,692	428,976,479	365,849,692	63,126,787	17%
Oil & Gas Taxes	70,619,130	46,903,129	70,619,130	46,903,129	23,716,001	51%
CFT/MVET/Weight Distance Taxes	55,207,519	51,254,210	55,207,519	51,254,210	3,953,310	8%
Personal Income Tax	58,966,370	56,281,560	58,966,370	56,281,560	2,684,810	5%
Corporate Income Tax	(8,417,401)	(17,637,696)	(8,417,401)	(17,637,696)	9,220,295	-52%
Royalties from Leasing MVD Data	57,822	708,791	57,822	708,791	(650,969)	-92%
Other programs	17,713,198	26,734,052	17,713,198	26,734,052	(9,020,854)	-34%
Total	623,123,116	530,093,738	623,123,116	530,093,738	93,029,379	18%