



**New Mexico Taxation & Revenue Department
Monthly Executive Dashboard as of November 30, 2017**

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 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	November	YTD
Collections Goal *	\$ 19,079,405	\$ 228,952,858
Actual Collections	\$ 13,806,969	\$ 104,698,315
Percent of Goal	72%	46%
Tax Credits (YTD Only)	# Completed	Disallowed Amount
Film Production Credit	29	\$ 869,540
High Wage Credit	8	\$ 848,578
Investment Credit	5	\$ 142,802
Technology Jobs Credit	11	\$ 5,293,378
Rural Jobs Credit	5	\$ 237,715
Advanced Energy Credit	-	\$ -
Alternative Energy Credit	-	\$ -
Total	58	\$ 7,392,012
Compliance	November	YTD
Bankruptcy Collections	\$ 111,435	\$ 576,939
PIT Assessments	\$ 256,525	\$ 802,312
Bankruptcy Proofs #	40	245
PIT Project/ QRU Notices #	3,316	17,311
Audits in Progress **	November	YTD
# Rec'd for Review	118	478
# Assessed	109	732
Amount Assessed	\$ 5,658,162	\$ 27,962,615
*The collections goal YTD is the annual goal for FY18. The snapshot of the YTD goal and collections would be, collections goal of \$92,461,731 with actual collections of \$104,698,315 which represents 113% of our goal.		
**The Audits in Progress section only represents audits that have been reviewed by ATSS.		

Motor Vehicle Division (MVD)	
Metric Measure	Results
Field Office Arrivals, Average Wait Time & Customer Satisfaction	
Customer Arrivals (total)	107,590
Average Wait Time	0:22:59
Customer Satisfaction (percentage good/excellent)	98.00%
Call Center Incoming Calls, Average abandon Rate, & Average Wait Time	
Calls Coming In (total)	52,052
Abandon Rate	38.86%
Average Wait Time	0:03:38
Customer Satisfaction Average (scale; 1-100; higher is better)	66.94%
Average Insured Rate	
Average Insured Rate	90.02%

Office of Internal Oversight (OIO)		
Description	November	YTD
Audits carry-over from FY 2017		6
FY 2018 Assigned	1	16
Canceled	1	1
Internal Audits Completed	1	10
Special Projects Completed	0	0
Internal Audits - Status for Month-Ending		
Open		1
Fieldwork		3
Report stage		1
Awaiting responses		3
On-Hold		0
Internal Audits Open:		8
Special Projects - Status for Month-Ending		
Fieldwork		1
Draft Report		1
Awaiting responses		2
Special Projects Open:		4

Information Technology Division (ITD)		
Common Categories	Service Pro	GenTax
Open	107	392
New	1214	96
Resolved	1321	74
Net Total	1428	414

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)	474,112,273	435,542,745	2,273,190,627	2,040,900,374	232,290,252	11%
Oil & Gas Taxes	69,957,290	59,128,825	344,521,761	244,812,061	99,709,700	41%
CFT/MVET/Weight Distance Taxes	68,524,091	69,900,018	310,054,918	299,231,306	10,823,612	4%
Personal Income Tax	36,626,585	29,067,546	180,777,395	164,029,953	16,747,442	10%
Corporate Income Tax	25,332,383	19,561,301	50,667,523	9,871,249	40,796,274	413%
Royalties from Leasing MVD Data	595,047	586,372	3,090,719	3,212,196	(121,477)	-4%
Other programs	36,001,110	26,311,164	115,747,772	113,887,232	1,860,540	2%
Total	711,148,778	640,097,971	3,278,050,714	2,875,944,371	402,106,343	14%



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Property Tax Division (PTD)				
Delinquent Taxes	Goal	Actual Results	% of Goal	Goal Type
Delinquent Accounts Worked	12,000	11,892	99%	Cumulative
Scheduled Delinquent Tax Sales	33	35	106%	Current
Delinquent Tax Sales # Counties	33	29	88%	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	46	71%	Cumulative
No. of Counties - Scheduled Protest Hearings	28	24	86%	Cumulative

Personal Income Tax Results (PIT 2016)					
Returns Processed	Nov 2017 Count	Count YTD	Current Exception Inventory	% of Returns Paper vs. E-File	Exception %
Paper Returns	2,527	87,544	-	10.4%	
E-filed Returns	1,216	750,213	-	89.6%	
Total	3,743	837,757	1,378		0.16%
Refunds Issued					
	Nov 2017 Count	Nov 2017 \$	YTD Count	% YTD	YTD \$
Paper Check	160,652	\$66,916,991	1,282,644	20.8%	\$478,386,069
Direct Deposit	526,850	\$265,522,683	4,872,666	79.2%	\$2,376,644,935
Total	687,502	\$332,439,674	6,155,310		\$2,855,031,004
Payments Received**					
	Nov 2017 Count	Nov 2017 \$	YTD Count	% YTD	YTD \$
Check	9,110	\$6,513,883	566,865	71.4%	\$345,023,966
ACH	5,114	\$1,730,206	227,081	28.6%	\$70,711,757
Total	14,224	\$8,244,089	793,946		\$415,735,723

Human Resource (HR)	
Description	Total
Work Orders YTD	945
FTE on TOOL	1,028
Filled Positions	816
Vacant Positions	212
Vacancy Rate	26.0%
Grievances Pending	0

Tax Fraud Investigation Divisions (TFID)			
Original Entry Date	Case Description	Disposition	Disposition Date
November	Tax Fraud	A case recommending prosecution of a Santa Fe resident was referred to First Judicial District for two (2) counts of tax fraud.	Ongoing
October	Tax evasion	A Taos contractor was re-indicted in the Eighth Judicial District on four (4) counts of tax evasion.	Ongoing

PROTEST OFFICE				
Activity	Total	Audit	Non-Audit	% Audit
Beginning Balance	573	139	434	24.26%
Protests Acknowledged	109	1	108	0.92%
Protests Closed	109	9	100	8.26%
Ending Inventory	573	131	442	22.86%
Ending Inventory Dollar Amount	\$166,800,612.29	\$93,117,883.70	\$73,682,728.59	55.83%