

eNate Siebel CRM Documentation Templates

CSR Note: This document does not replace the Call Guide for the below items. The Call Guides should still be used to assist you with the process. Fill out the applicable information within this word document and then copy and paste the completed template into your Siebel CRM description. Please ensure accuracy when filling this template out – verify all data while the employee is on the phone

Voluntary Separation

Employee Number (not Siebel Employee #):

Employee Work Email Address:

Last Day Worked (Last Day Worked cannot be on a weekend, holiday, or vacation day):

Reason Code (Must be Resignation or Retire (55 years old AND 10 years of service OR 65 year old):

Vacation Taken in Notice (must be in days):

PC Return Box Ship To- Contact Name (if different than employee):

PC Return Box Ship To- Phone Number/Contact Number:

PC Return Box Ship To- Address (please note if the employee would like to drop PC off at current home or alternative

office location and enter as appropriate):

Employee Personal E-mail:

Address Change -employee can also update this through MyConnect/Employee Self Service (ESS)

Employee Number (not Siebel Employee #):

Employee Email Address:

Effective Date (cannot be a date in the past):

Address Type (ask if mailing or home and *ask if new address should become the only one kept on file*):

Address Line 1:

Address Line 2:

City:

State/Province:

Zip/Postal Code:

Country:

Employee Primary Name Change

Employee Number (not Siebel Employee #):

Employee Email Address:

Effective Date (cannot be a date in the past):

Name Change Type (preferred or primary):

New Employee Name (if name type is preferred only first name is needed):

Employee E-mail if different than Siebel CRM record:

We do not refer to HRBP

ADP rep submits the name change request in eNate -> eNate generates 2 tasks: 1) to our general processing queue awaiting the document submission and 2) to the employee to submit the new SS card – that task is called a 'remote manual task'. That eNate 'remote manual task' email is generated to the email address that the ADP rep inputs in the originator's form. -> Once the employee submits the new SS card, the task is assigned to our processor. -> the eNate is processed in SAP and a template is generated back to the employee informing them that the change has been completed. The employee generally receives this confirmation email a day after they submit the new SS form via the 'remote manual task'.

Capgemini US employees can complete the following transactions or updates to personal records using the MyConnect/ ESS portal –

- Address Change – Mailing Address, Permanent Address
- Preferred Name
- Emergency Contacts
- Personal Email
- Personal Phone