



Concord Care Intake

Care Intake Folder Monitor

Installation and Configuration Guide

Table of Contents

Change History	3
Overview.....	3
Disclaimer	3
Introduction	4
System Requirements	5
Installation Procedures	6
Windows Services Settings.....	8
Getting Familiar with the Interface	9
Authentication	10
Configuring Upload via Document Intake	11
Configuring Download via Document Retrieval.....	12
Logging.....	13
Getting Help.....	14

Change History

Version	Date	Notes
1.0	May 2025	Initial Creation

Overview

This document describes the installation and Configuration of Concord's upload/download utility **Care Intake Folder Monitor**. Care Folder Monitor can be used to upload documents of varying types to the Care Intake application and/or retrieve documents that have been processed to disposition in Care Intake.

NOTE: Concord offers **two different** 'Folder Monitor' software installation downloads. One is used to manage file upload/download for Concord Care Intake and the other is used to manage file upload/download for Concord's NEXTSTEP platform. Please ensure you download the proper Folder Monitor installation file for your use case.

If you have any questions about this application, please contact premiumsupport@concord.net.

Disclaimer

THE MATERIAL IN THIS GUIDE IS FOR INFORMATIONAL PURPOSES ONLY AND IT INCLUDES NO WARRANTY WITH RESPECT TO THE SERVICES DESCRIBED HEREIN. THE PRODUCTS AND SPECIFICATIONS IT DESCRIBES ARE SUBJECT TO CHANGE WITHOUT PRIOR NOTICE. CONCORD IS NOT RESPONSIBLE FOR ANY DAMAGES OF ANY NATURE WHATSOEVER RELATED TO OR ARISING FROM RELIANCE ON THE INFORMATION CONTAINED HEREIN.

Introduction

Welcome to **Care Intake Folder Monitor**, a Windows utility that provides document **upload** (intake) and **download** (return) capabilities to Concord's Care Intake referral processing application.

The Folder Monitor **intake** process monitors network folders for new documents to be uploaded to your Care Intake queue. The **return** process monitors your Care Intake queue for referrals and supporting documents that are flagged for retrieval following disposition.

There are several use cases for Folder Monitor, including:

- **Individual users** can install Folder Monitor on their personal machines as an easy way to drag and drop documents into a folder and have those documents automatically upload to Care Intake.
- Network admins can install Folder Monitor on a server to provide the same functionality to a **work group or department**, using a single installation of the tool. They would do this by providing shared access to the monitored folder.
- **Applications** can be integrated with Care Intake in the same way: configure the applications to drop files into the monitored folder location to submit items to Care Intake automatically; or configure applications to pick up files in retrieval directories to process documents released by Care Intake following

As many applications can utilize retrieval from a network folder to import documents, Folder Monitor is often used as a step in **integrating** with downstream systems such as EMRs, where relevant documents and data may be directed to the proper system of record automatically following disposition.

System Requirements

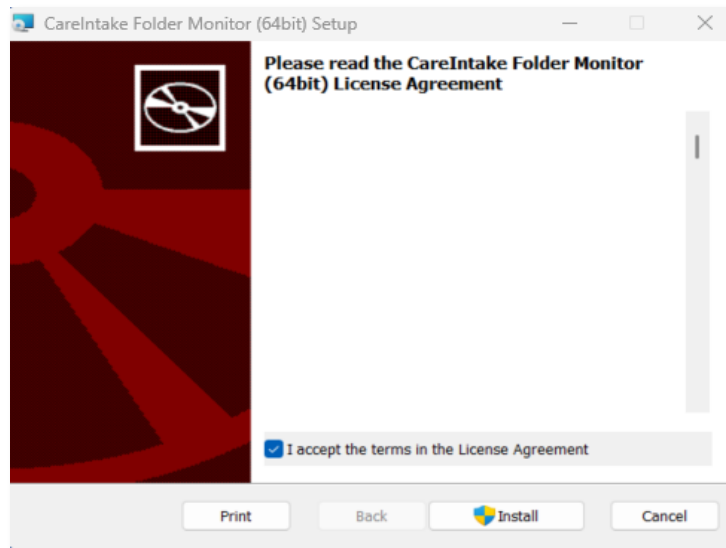
To use Concord's Care Intake Folder Monitor, you must have a valid Concord **Care Intake Account** and conform to the following:

- Supported **operating systems**: Windows 10, Windows 2012, Windows 2016
- Folder Monitor requires at least 64 megabytes (MB) of **RAM**. 128MB is recommended.
- Folder Monitor requires at least 50 megabytes (MB) of available space on the **hard disk**. More may be required based on the level of traffic to handle.
- **Scaling** resources would be treated exactly as any network file server, as the utility mimics similar behaviors, and so uses similar resources:
 - Folder and file enumeration
 - Network transfer of files, both from users when using a monitored network share and to/from the Care Intake platform
 - Web service calls to the Care Intake platform

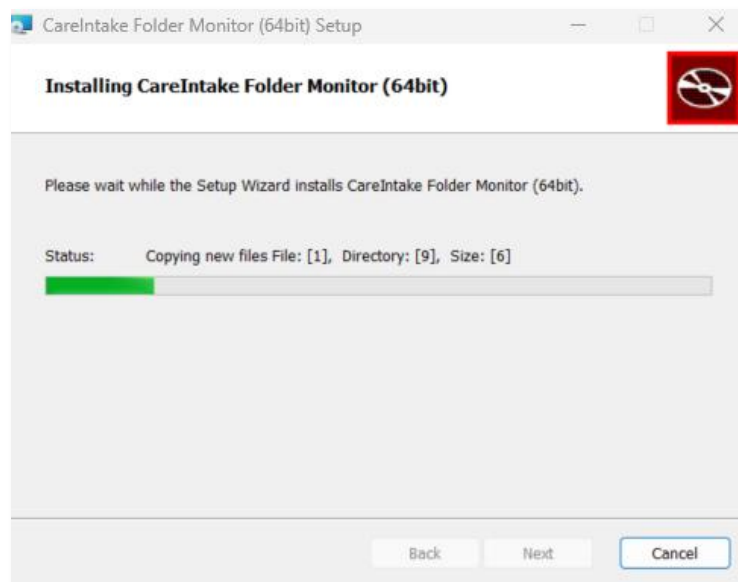
Installation Procedures

The following steps will be followed to **install** Concord’s Care Intake Folder Monitor:

- **Download** the Folder Monitor Installer
- **Disable** any anti-virus software before installing Folder Monitor
- **Run** the install setup by double clicking the *FolderMonitor.msi* file
- **Accept** the License Agreement and click **Install** to initiate the installation:

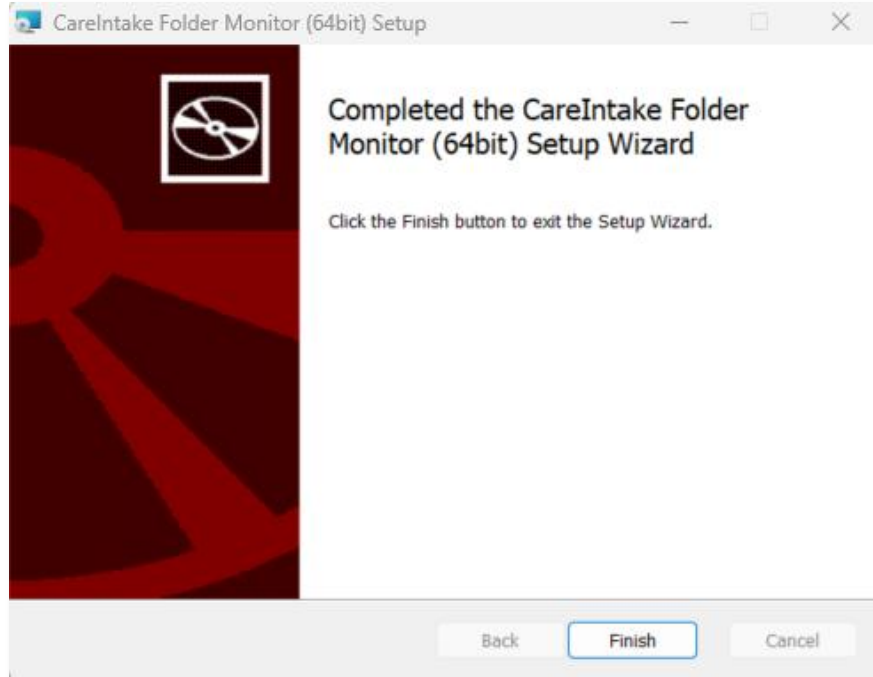


A progress bar will display your installation **progress**:



Once **finished**, you will receive a successful installation notification.

Click **Finish** to exit the installer:





Windows Services Settings

When you are using Folder Monitor to upload or download faxes from network folders, the application will need **Windows permissions** to access those locations. You must set the permissions for the Windows services using an account that has access to the locations.

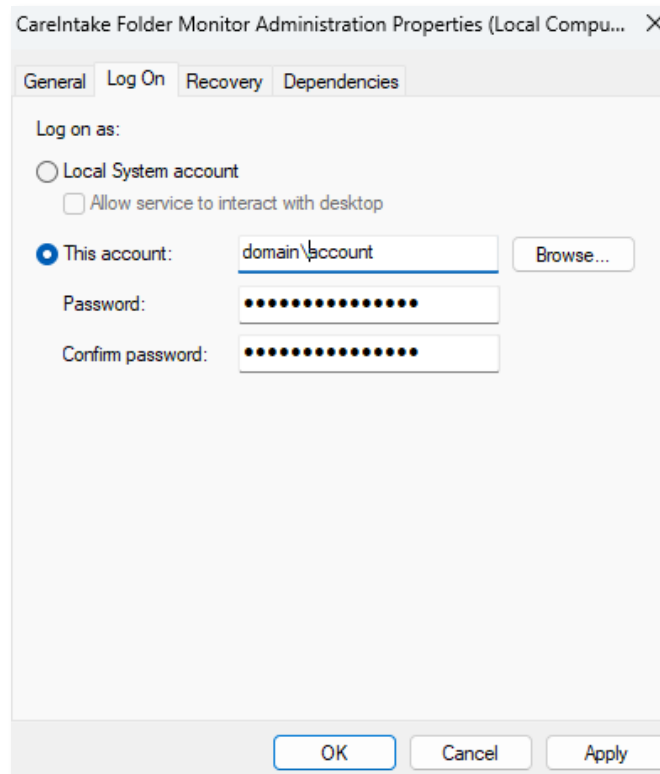
To set permission go to **Start > Control Panel > Administrative Tools** and open **Services**.

Find the **CareIntake Folder Monitor** services as shown below:

	CareIntake Folder Monit...	The administrative service for the CareIntake Folder Monitor.	Running	Automatic	Local System
	CareIntake Folder Monit...	The processing service for the CareIntake Folder Monitor.	Running	Automatic	Local System

Right click on the service and select **Properties**.

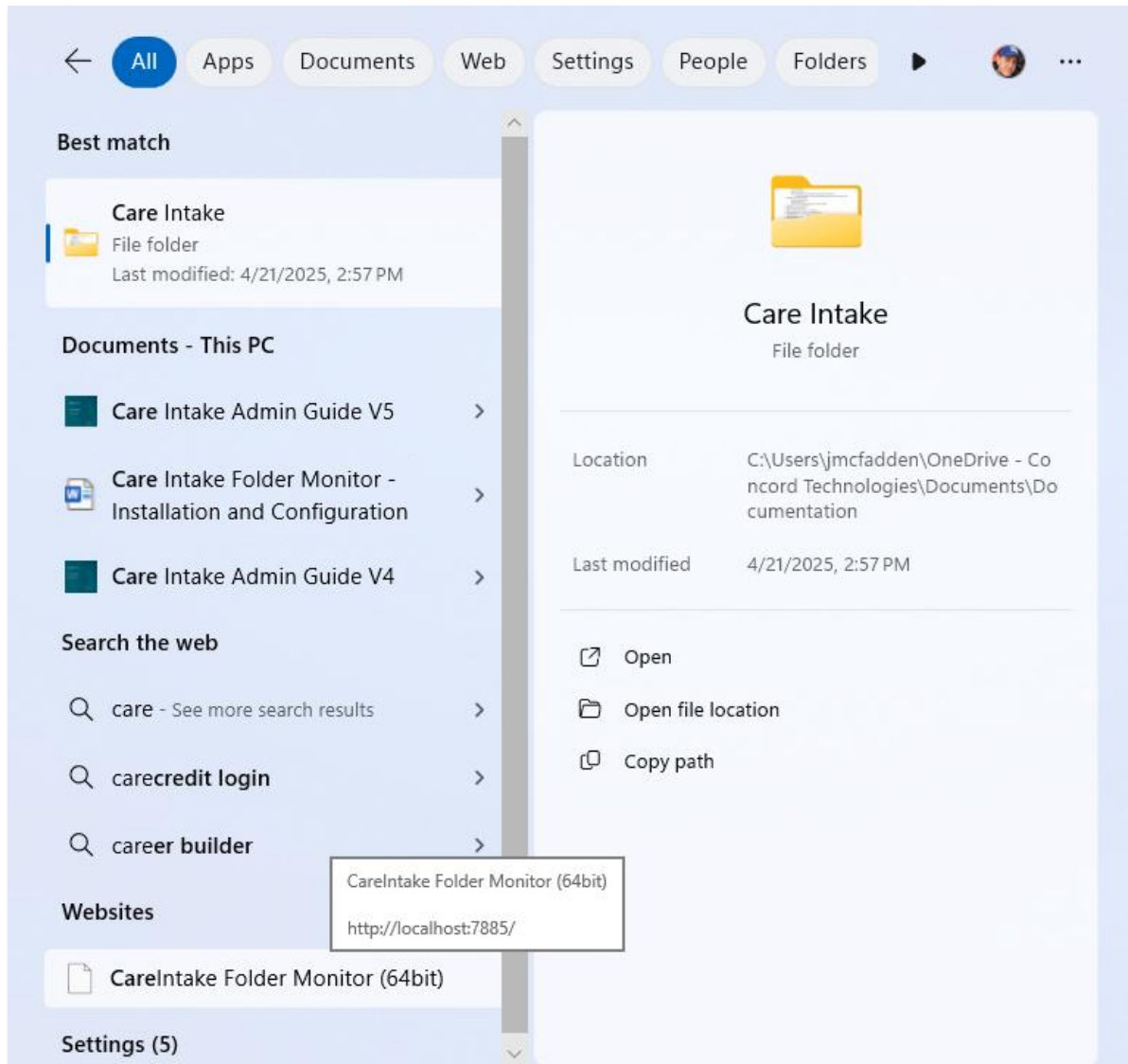
Click on the **Log On** tab and change the "Log on as" to "This account" and type in the windows account that is required to access the remote resources:



Note: This is only required if the remote resource requires Windows permissions to access.

Getting Familiar with the Interface

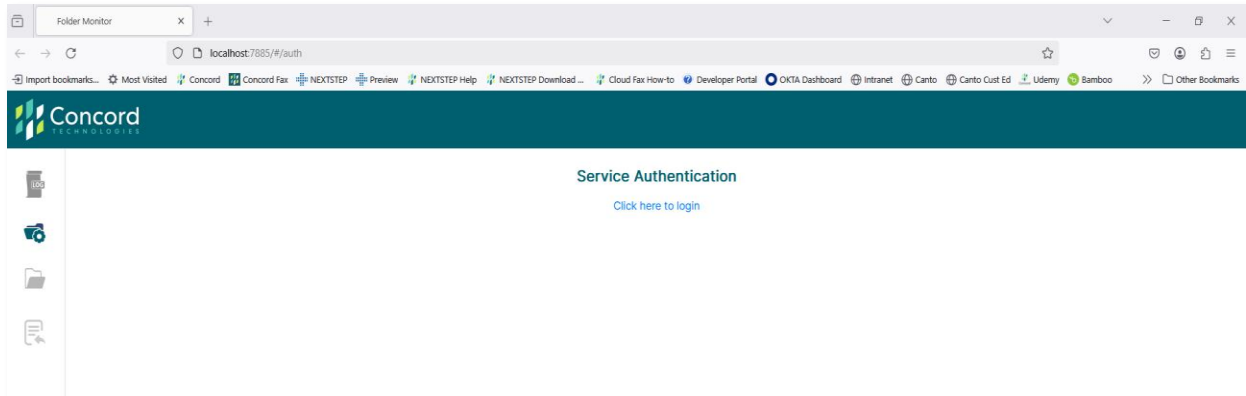
Launch the Care Folder Monitor configuration interface from the Start menu:



Authentication

The first step after launching the user interface is to navigate to **Service Authentication** and log in using Care Intake user credentials that have access to Care Intake queue that you will be connecting Folder Monitor to:

It is recommended that a **user account** be created specifically for the purpose of upload/download via Folder



Monitor.

Once authenticated, these credentials will be **retained** for the operation of Folder Monitor:

A screenshot of the 'Service Authentication' form. The form is white with a teal title 'Service Authentication' at the top. It contains three input fields, each with a label and a value: 'Display Name' with the value 'Folder Monitor', 'Account Number' with the value '856747', and 'Customer Account Number' with the value '902388'. Each field is followed by a horizontal line. At the bottom of the form, there is a teal button with the text 'Reset Details' in white.

Credentials can be reset by returning to the **Service Authentication** page.

To **reset** the password on your Care Intake enabled user account, you can enter the username here:

<https://login.concord.net/v1/Account/ForgotPassword>

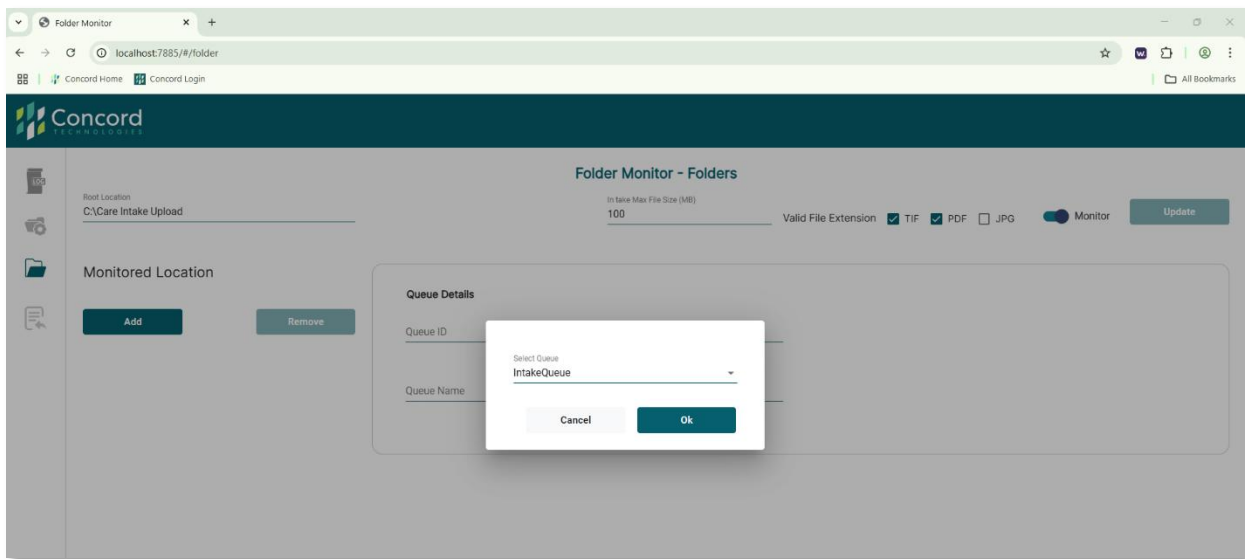
Configuring Upload to Care Intake

In **Root Location**, enter the path for the folder you want monitored for file upload. This will become the root path, and Folder Monitor will create an **upload folder** within this root.

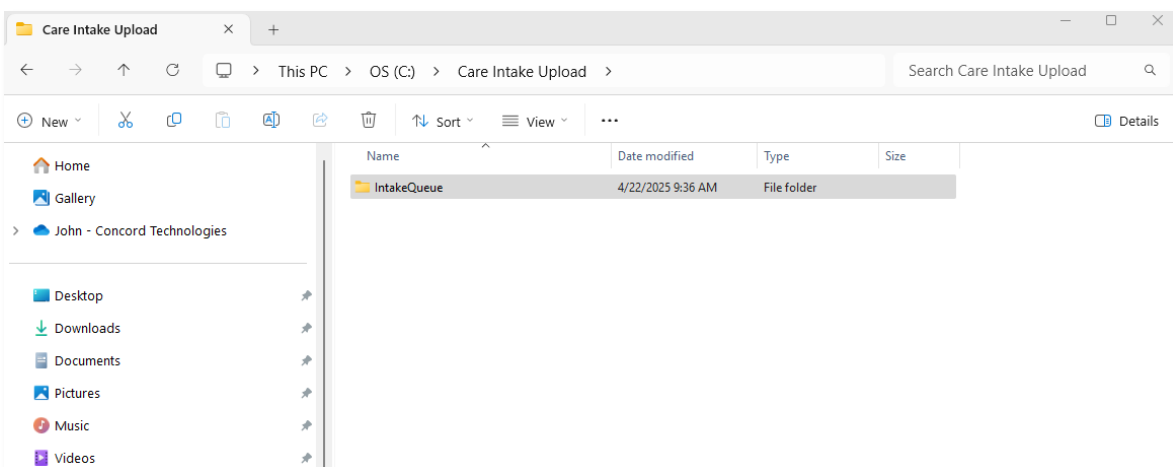
Configure the maximum **file size** and **file types** for documents that can be uploaded.

Toggle the **Monitor** switch to **On** and click the **Update** button to connect to the Care Intake platform.

Click **Add** to view and select the Care Intake queue you will be uploading to and then click **OK**:



Folder Monitor will automatically create an **upload folder**, named according to the Care Intake queue you connect to, which is the destination for and documents to be uploaded:



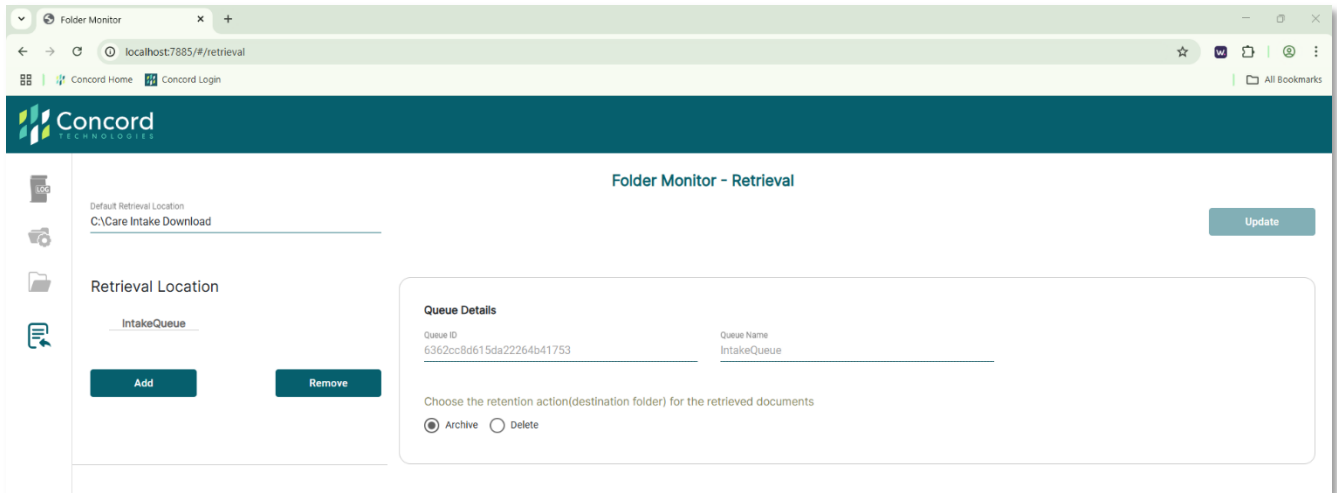
Configuring Download

Before beginning, it is important to note that exporting documents from Care Intake requires that **Retrieval** is enabled and configured on your Care Intake account. Please see the **Care Intake Admin Guide** for more details on configuring Retrieval.

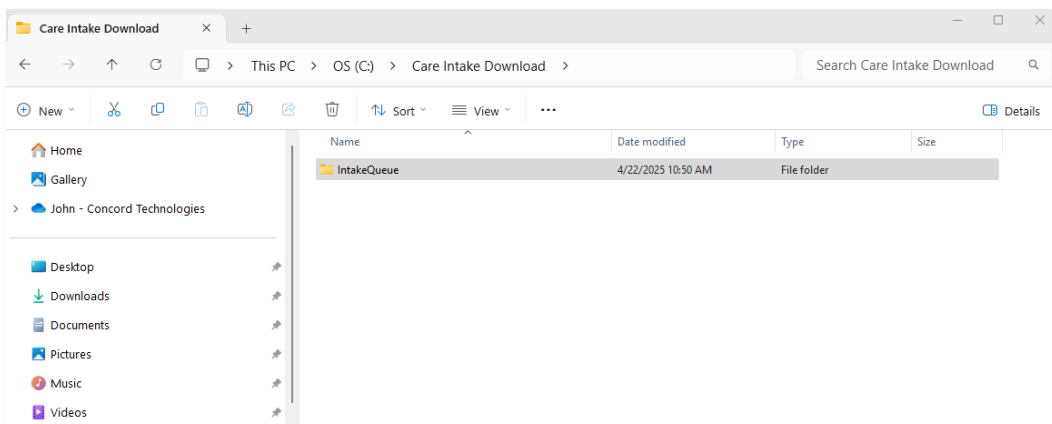
Once retrieval has been enabled you can start Folder Monitor and enter the **Root Location** file path to create the base location for documents to be stored as they are exported from Care Intake.

Click **Add** to view and select the Care Intake queue you will be exporting from.

Choose what should be done with documents on the Care Intake platform once they are exported. These may be **Archived** or **Deleted** or you may elect to make **no selection** and items in Care Intake will be left in their standard **Closed** folders following download.



As with the Intake process, Folder Monitor will automatically create a **nested folder structure** within the Root Location, to represent each shared queue connected for download:



Logging

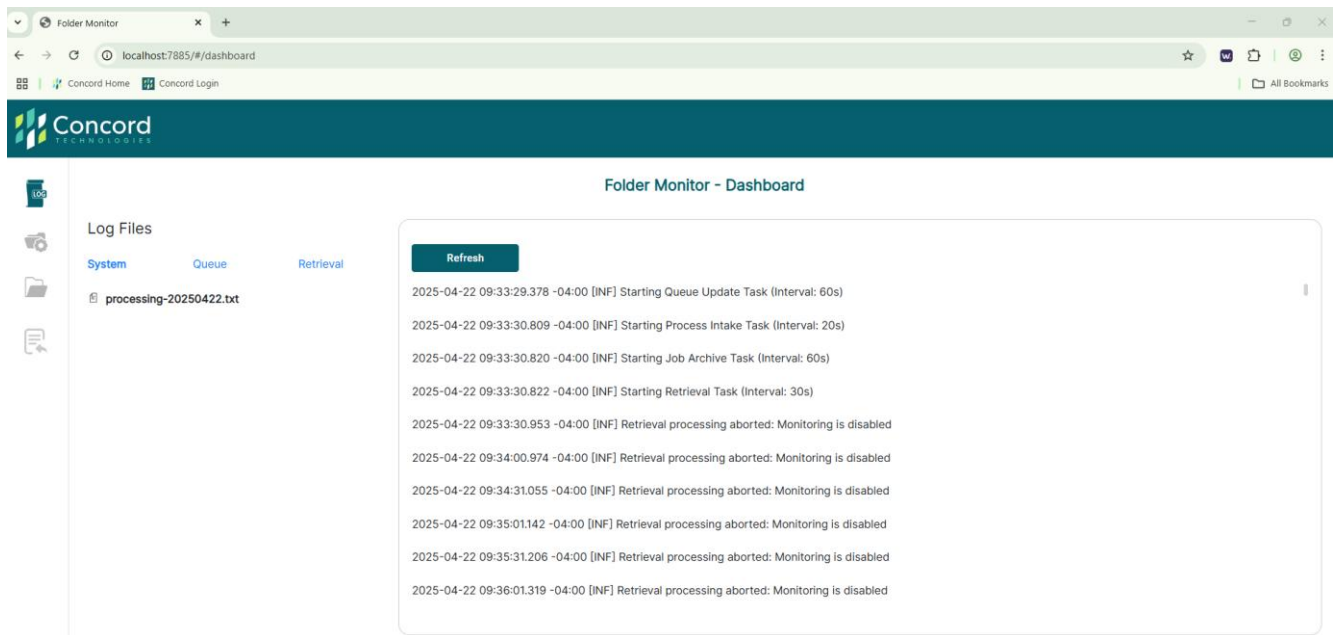
The Log Files section of Care Intake Folder Monitor provides an interface for viewing text-based logs according to various levels of processing:

System: Logs pertaining to the overall system processing and HTTPS connectivity of Folder Monitor

Queue: Logs pertaining to activity associated with your specific Care Intake queue.

Retrieval: Logs pertaining to the retrieval/download of and their routing to the destination folder.

These logs allows you to **monitor** Folder Monitor application activity, **research** problems or provide Concord technical support with log extractions as needed to **diagnose** problems.



All logs are stored in the folders created by Folder Monitor for upload/download during configuration.

An additional **[Archive]** folder will be created for retaining uploaded documents and logs associated with successful or failed processing of documents during upload.

Getting Help

Concord's **Premium Support** team is available Monday–Friday from 6:00 AM to 6:00 PM (Pacific Time).

Phone: +1 (206) 441-3346

Emergency After Hours Phone: +1 (206) 467-4068

Email: premiumsupport@concord.net

Web: <https://concord.net/technical-support/>