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Q3 2026 recap: Product vision, strategy, and the all-new OnPatient portal

Overview

This quarter's Empower webinar centered on where DrChrono product strategy is headed through 2027. Grant Lunney, Head of Product at EverHealth, shared the four priorities guiding the roadmap, the team fielded live customer questions, and Principal PM Ali Anderson closed with a full walkthrough of the rebuilt OnPatient portal and the new threaded **Message Center**.

Key themes and takeaways

Grant framed DrChrono's product direction around four connected priorities.

Performance, first and always

If the EHR isn't fast and reliable, nothing else matters. Performance is described as the permanent top priority — every new release and every existing workflow is measured against it. Grant invited customers to flag any remaining slow spots directly to the product team.

Reducing workflow debt

Years of bolt-on features and regulatory requirements have added steps to everyday workflows. The team's goal is to strip out unnecessary friction — Grant's example: a task that takes five steps today should take two. Clinical documentation time is a particular focus area for continued reduction.

Consistency in design

Design leadership (led by Allison Wegner) is working to make DrChrono's behavior predictable — so a feature works the way a user expects the first time, without a learning curve. This includes search performance, navigation patterns, and decluttering the interface.

Smarter, safer ambient clinical documentation

This is the most multi-part pillar, with four components:

- Smarter pre-visit capture: feeding visit type, prior notes, and intake context into the ambient/transcription engine so documentation starts with context already in place.
- Hardware and connectivity reliability: building fallback paths (for example, cellular backup, record-then-upload) so a recording never silently fails, since Grant noted that's the moment practices lose trust in ambient tools.
- In-visit annotation: letting providers capture quick notes during the visit and time-stamp them against the transcript, reducing reliance on printed face sheets.
- Deeper workflow integration: connecting ambient output directly into prescriptions, orders, and prior authorizations so documentation translates into action without re-entering data.

What's new: The rebuilt OnPatient portal

Ali Anderson demoed the ground-up rebuild of OnPatient (not just a refresh of the old version).

Highlights for your practice

- A centralized, practice-group-level settings area to manage OnPatient branding, colors, logo, and messaging.
- A new announcements banner (e.g., for office closures) with an optional auto-expiration date.
- Automatic check-in reminders that detect incomplete intake and re-prompt patients ahead of their visit.
- Simplified intake configuration with toggle-based required/optional/hidden settings, plus direct access to the form builder for custom forms.
- A streamlined, threaded **Message Center** (email-inbox style) for two-way patient messaging, including internal (non-patient-facing) notes on a thread.
- Invitations now include an activation code as a built-in backup login method, in addition to the sign-up link.

Highlights for your patients

- A cleaner registration and login flow, built as a new experience rather than a patch on the old one.
- A home dashboard showing the next appointment, check-in, billing, scheduling, and messaging in one place.
- Access to current and past statements and receipts (previously statements weren't viewable historically).
- Threaded messaging with up to 15 attachments per message (up from one).
- Visibility into problems, allergies, medications, pharmacies, lab results/requisitions, immunizations, and a vitals history over time.
- Improved representative access for family accounts (e.g., a parent managing multiple children's accounts), with clear labeling on both sides of who sent each message.
- Existing OnPatient users do not need to be reinvited — they can log into the new experience with their existing credentials.

Native iOS and Android patient apps are also in development, which will add push notification controls alongside existing email/SMS options.

Interested in early access to the new OnPatient experience or the updated **Message Center**? Reach out via the support channels below.

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Live Q&A: Full FAQ

Below is the complete set of questions raised live during the webinar, along with the product team's answers. If your question wasn't addressed live, EverHealth's team will follow up with you directly.

Messaging and patient records

Can patient messaging be made part of the medical record, and filterable in or out of the documents/general section?

The team has been reworking the entire messaging workflow over the past six months, including the new threaded **Message Center**. They're actively evaluating where conversations should surface within the patient chart (documents is one option under consideration) so information is easy to find without switching screens.

Messages sent from Documents to OnPatient currently lack a subject line, making them hard to review later — will that change?

Yes. With the move to threaded messages, every conversation now has a subject line, which will also carry into the

Communications tab. The team is continuing to evaluate whether messages should additionally surface in **Documents** or the **General** section.

Will providers be able to see if a patient has read a message, and when?

Not with the initial release of the new **Message Center**, but read receipts and timestamps are on the roadmap as a planned addition — the team recognizes this matters for clinical and legal documentation.

Account and support

How can I get in touch with my account team more easily?

Use the in-platform support function (chat, email, or the support form). That's the single entry point that connects you to your full account team, including your Customer Success Manager and Account Manager.

AI and clinical documentation

Can ambient notes (or third-party ambient tools) integrate with literature/research-based AI to suggest differentials or provisional diagnoses in real time?

That is the direction the team is heading. Current work is focused on refining transcription accuracy using layered context; incorporating evidence and guideline sources for real-time clinical decision support is on the roadmap, though Grant characterized it as early-stage — past a crawl, not yet a sprint.

When will improvements land for quality/eCQM measures, such as cancer-screening tracking?

Quality measures are an area of focus heading into 2027. The team offered to follow up directly with the customer who asked to better understand their specific quality-measure workflow before committing to a timeline.

Referrals, Documents, and RCM

Can the EMR send referrals with a unique referral ID?

The team will follow up directly to learn more about this specific referral workflow before scoping a solution.

Can the document tagging experience be reverted to how it worked before the recent update? The ne version is described as more convoluted and slower to tag.

The team will follow up directly to understand how the change has affected this workflow and identify improvements.

Can a pre-collection status/filter be added on the RCM side — for example, filtering patients who haven't paid within 30/60/90-day windows — so collections aren't triggered unnecessarily?

The team is building automated statement "dunning" cycles (30/60/90-day) with configurable messaging, tied to billing status. Once a patient's billing status is flipped to collect, statements will be sent automatically on that cycle with visibility into where each patient sits. The team offered to follow up with a preview once further along.

Is there an easy way to run a refund report, including pending claims?

Refunds can be issued today from the patient payments report/page. The team welcomes follow-up from anyone whose reporting need goes beyond what's available there.

Family/multi-patient accounts

Families with multiple children each need separate OnPatient accounts and separate emails today — has that changed?

The requirement hasn't changed completely, but setting up and switching between multiple linked accounts (representative access) is significantly improved in the new OnPatient experience, as shown in the live demo.

Intake, consent, and payments

With upcoming changes to consent forms, will patients be able to interact with them directly?

Yes — patients can already fill out consent forms as part of the check-in process in OnPatient.

Can mandatory credit card fields be added to OnPatient during initial intake?

Not today — intake doesn't currently collect credit card information. Adding a payments step to intake is something the team is exploring as part of ongoing improvements to the intake process.

OnPatient portal rollout

When will the new OnPatient portal be available?

It's available now for beta customers, with general availability planned for later this year. Practices interested in joining the beta can reach out through their Customer Success Manager or in-platform support.