

Add Chairside AI to Claude in 5 Minutes

Welcome. This guide walks you through adding your Chairside AI skills to Claude — step by step, no technical background required. If you can copy a file to a USB drive, you can do this.

What you need before you start

- A **Claude account** at claude.ai
- The **Chairside AI Kit** — a folder of ZIP files you downloaded from the workshop page
- About 5 minutes

Which Claude plan? Claude Pro (\$20/month) is strongly recommended so you don't hit usage limits mid-session. Claude's Free tier technically works but can cut off during longer tasks. If you're not yet on Pro, upgrade at claude.ai → Settings → Plan.

Step 1 — Check that Claude can run your skills

Settings → Capabilities → "Code execution and file creation"

This setting should already be turned on by default. Here's how to confirm:

1. Go to claude.ai and log in
2. Click your **account icon** in the top-right corner → **Settings**
3. Click **Capabilities** in the left sidebar
4. Find **"Code execution and file creation"** — make sure the toggle is **on** (blue/enabled)

[screenshot: Settings → Capabilities page with toggle highlighted]

If it's already on, you're good. Move to Step 2.

Step 2 — Turn off model training (privacy)

While you're in Settings, do this quick privacy step:

1. In Settings, click **Privacy**
2. Find "**Improve Claude for everyone**" (or similar wording about using your conversations to train the model)
3. Turn it **off**

[screenshot: Privacy settings page with training toggle]

This means your conversations stay private and aren't used to train Claude's future versions. Takes five seconds, worth doing now.

Step 3 — Go to Skills settings

1. Still in Settings, click **Customize** in the left sidebar
2. Look for a **Skills** section (it may also appear as "Custom Skills" or be in the "Customize" area)
3. You'll see an option to upload a skill

[screenshot: Settings → Customize → Skills section]

Step 4 — Upload your first skill

You'll upload one skill at a time. Let's start with **Money-Leak Finder** (the most immediately useful one).

1. In the Skills section, click "**Upload skill**" (or "Add skill" / "Import")
2. A file picker will open — navigate to where you saved the Chairside AI Kit
3. Find the file called `chairside-money-leak-finder.zip` and select it
4. Click **Open** — Claude will install it in a few seconds

5. Make sure the toggle next to the skill is **on** (enabled)

[screenshot: Skills section showing Money-Leak Finder installed and toggled on]

Repeat this for any other skills you want to add. You can add them all now or one at a time.

Step 5 — Try it right now

Open a new Claude chat. Type something like:

"I want to run a money-leak analysis on my practice. What do I need to give you?"

Claude will recognize the skill and walk you through it. That's it — you're set up.

Important: use the ZIPs from this kit, not your own

The ZIP files in this kit are specially prepared so Claude can read them correctly.

Do not re-ZIP them yourself. If you extract a ZIP and then re-compress it using your Mac's Finder "Compress" option, macOS adds hidden junk folders inside (`__MACOSX/` , `._files`) that confuse Claude.

Think of it like a medical kit that came in a sealed tray: use it as-is, don't repack it.

If you ever need a fresh copy of the ZIPs, go back to the workshop download page.

How skills work (the 30-second version)

You do **not** use slash commands or special syntax. Just describe what you want in plain English and Claude will recognize which skill to use automatically.

- "Help me analyze my overhead and find where money is leaking" → Money-Leak Finder
- "I have a patient who's putting off their treatment plan" → Case Closer
- "I want to do a fee audit" → Fee Auditor

The skill fires on its own. You just talk.

Adding more skills

All eight skills are in your kit. You add each one the same way: Settings → Customize → Skills → Upload → toggle on.

You only have to do the setup steps (1–3) once. After that, adding a new skill takes about 30 seconds.

Stuck? Three quick fixes

Problem	Fix
"I don't see a Skills section in my settings"	Skills live under Settings → Customize . If they're missing, confirm "Code execution and file creation" is ON (Settings → Capabilities), then refresh the page. Skills work on the Free plan.
Skill uploaded but Claude doesn't seem to use it	Check that the toggle next to the skill name is on (not just installed, but enabled).
Claude cuts off mid-task	You may have hit the Free tier limit — upgrade to Pro.

You've got this. Claude is very forgiving — if a message doesn't land right, just rephrase and try again.