

Using Chairside AI Safely

Practical guidance, not legal advice. Confirm specifics with your compliance person.

The consultant analogy

Think of Claude like a brilliant business consultant you hired who happens to work in your conference room. Before you hand a consultant a file, you'd probably say: "Here are the numbers — I've taken the names off." You wouldn't hand them a folder with patient charts still labeled. Same idea here.

Claude is extraordinarily good at analyzing the *business side* of dentistry — collections, overhead, fee schedules, case conversion, staffing — without ever needing to know a patient's name.

The three rules

1. Lose the name — de-identified data isn't PHI

HIPAA protects **Protected Health Information**, which is health information linked to an *identifiable individual*. When you remove the identifiers — name, birthdate, Social Security number, account number, member ID — what's left is just data, and HIPAA doesn't apply to it.

What you're removing: - Patient name → replace with "the patient" or nothing - Date of birth → remove or replace with age range ("mid-40s") - Member ID / account number → remove - Address, phone, email → remove

What you can keep: Diagnosis codes, procedure codes, fee amounts, collection totals, dates of service (without the patient attached). All of that is useful and completely fine.

***Practical example:** Instead of pasting "John Smith, DOB 04/12/1979, ADA code D2750, fee \$1,200, insurance paid \$800" — paste "ADA D2750, fee \$1,200, insurance paid \$800." Claude gets everything it needs. John stays private.*

2. Turn off model training

By default, Claude may use your conversations to improve its future models. That setting is opt-out, not opt-in — meaning it's on unless you turn it off.

Turn it off: Settings → Privacy → "Improve Claude for everyone" → **off**

Once you've done this, your conversations aren't used for training. This is a good habit for any AI tool you use professionally, not just Claude.

3. It's your own locked account

You're not posting to a public forum. Your Claude account is password-protected and private to you. Conversations don't appear anywhere else and aren't visible to other users.

That said, treat Claude the same way you'd treat any cloud software you use (your practice management system, your email): don't share your login, use a strong password, and enable two-factor authentication if available.

What about bank statements?

Bank statements are financial records, not health records. They don't contain patient health information — they contain transaction amounts, dates, and vendor names. **Bank statements are not PHI.**

You can share your practice's bank statement (with your account number blacked out) with Claude for overhead analysis. Claude will treat it like a spreadsheet, not a medical record.

What about at scale — if I'm using this across my whole team?

The skills in this kit are designed for individual practitioners using their personal Claude account. The consumer/Pro tier is appropriate for personal use and does not require a Business Associate Agreement (BAA) because:

1. You're de-identifying before you paste
2. Claude's consumer plan isn't a covered entity processing PHI on your behalf

If you want to deploy AI tools at scale — across multiple staff members, processing identified patient data, integrated with your practice management system — that's a different scenario. That setup would typically require a HIPAA-compliant business tier with a signed BAA. Not this kit, but something worth knowing as you grow.

For this workshop kit: follow the three rules above, keep it personal and de-identified, and you're on solid footing.

The short version

Situation	Safe to use with Claude?
Overhead totals and categories	Yes — financial data, not PHI
Fee schedule (CDT codes + your fees)	Yes — no patient data involved
De-identified EOB (name/ID removed)	Yes — identifiers stripped
Bank statement (account number blacked out)	Yes — financial data, not PHI
Full patient chart with name and DOB	No — keep this in your practice management system
Identified treatment plan with patient name	No — de-identify first

This is practical guidance based on how HIPAA works, not legal advice. If you have specific compliance questions about your practice's situation, your compliance officer or healthcare attorney is the right person to ask.