

Before you use AI with anything about patients*

One page. Ten minutes. Then a habit.

1 Change these settings first (5 minutes)

- **Claude:** Settings › Privacy. Turn off **Help improve our AI models**. With it off, Anthropic keeps chats for 30 days and doesn't train on them (Free, Pro and Max plans). Team and Enterprise are never used for training.
- **ChatGPT:** Settings › Data controls. Turn off **Improve the model for everyone**.
- Don't share a link to a chat that held practice work. A shared project is visible to everyone in it.

2 What to connect, and what not

Fine to connect

- ✓ A marketing inbox, not the one patients write to
- ✓ A Google Drive folder with marketing photos only
- ✓ Google Business Profile, Search Console and Analytics
- ✓ Your Facebook, Instagram and Google ad accounts, to read campaigns
- ✓ Your website (WordPress or Wix) and Canva
- ✓ Apify, for public Instagram accounts

Don't connect

- ✗ The practice inbox where patients write, unless you're on a business plan your practice has a data agreement for
- ✗ Your practice software or patient records
- ✗ Your whole Drive, if clinical folders are in it
- ✗ WhatsApp chats with patients
- ✗ Contact lists of patients, to Claude or to any ad platform

3 Never paste

- | | |
|--|--|
| ✗ Names. | ✗ Dates of birth. |
| ✗ Addresses, phone numbers, emails. | ✗ Record, health or insurance ID numbers. |
| ✗ Appointment dates tied to a person. | ✗ X-rays or clinical photos with a face or a name. |
| ✗ Screenshots of your practice software. | ✗ A full complaint letter. |
| ✗ A transcript with names in it. | |

4 Anonymise in five steps

- 1 Swap names for [PATIENT], [DENTIST], [NURSE].
- 2 Take out contact details and any ID numbers.
- 3 Swap exact dates for "last spring" or "two weeks ago".
- 4 Take out rare details that point to one person: their job, their street, an unusual story.
- 5 Paste, then ask: "Is there anything in this that could identify a person?" Fix what it finds before you use the reply.

5 In public

- Never confirm that someone is a patient: not in a review reply, a post or an ad.
- Before and afters, and reviews with names: only with written consent, kept on file.

6 Which plan for which job

- **Marketing** (posts, reels, ads, your website, review replies with no details): any plan, with training off.
- **Letters, complaints or transcripts about real patients:** anonymised first, and on a business plan your practice has accepted the data terms for: Claude Team (from 2 seats) or Enterprise.
- **US practices with protected health information:** only Claude Enterprise with HIPAA turned on and the business associate agreement accepted. Team, Pro and Max can't sign one.

7 If something slips

- 1 Delete the chat.
- 2 Tell your practice manager or data lead.
- 3 Note it in your incident log.
- 4 Follow your country's breach rules.