

# CLIMB

TRAINING MANAGEMENT SYSTEM

## How to Use Climb TMS

*A Guide for Chief Pilots & Flight School Administrators*

**DRAFT**

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Questions this guide doesn't answer? Contact [team@climb.aero](mailto:team@climb.aero)

## 1. Overview

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This guide is for chief pilots, flight school administrators, and Part 141/Part 61 program managers using Climb TMS. It covers how to manage your flight school's presence on the platform, oversee instructors and students, and monitor training progress school-wide — and it summarizes the instructor and student workflow so you can support your team and answer common questions.

### A few things that are true everywhere in Climb TMS

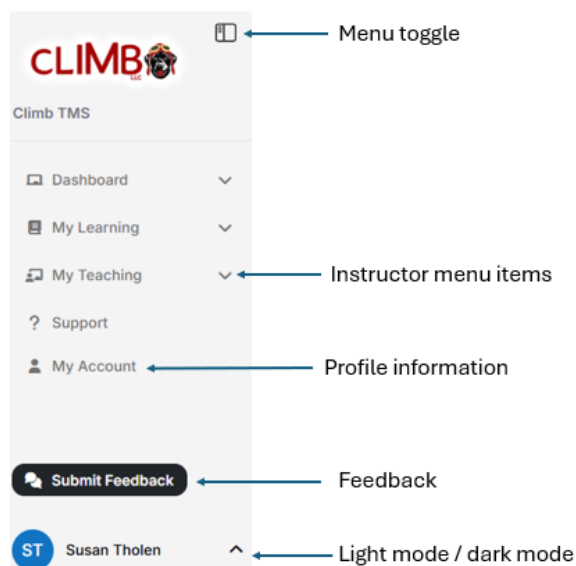
- The main menu contains different items depending on your role. As a chief pilot or school administrator, you'll typically see both “My Schools” and “My Teaching” (if you also instruct).
- The menu can be opened or closed with the menu toggle icon.
- A feedback button (lower left, above your name) lets you submit feedback directly to the Climb team.
- Click your name to switch between light/dark mode or sign out.

**NOTE** A dedicated flight-school-wide dashboard is still in development. Until it ships, use the Course Progress and Reports tools described in Section 6 to get a school-wide view of student status.

## 2. Navigation Overview

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The screenshot below is from the current release and shows the main navigation panel and the account/profile controls.



*Main navigation panel: menu toggle, role-based menu items, feedback, and account controls.*

- Dashboard, My Learning, My Teaching, Support, and My Account appear or disappear based on your role and permissions.
- As a chief pilot or administrator, look for “My Schools” in this list — that's where flight-school-level administration happens (Section 3).

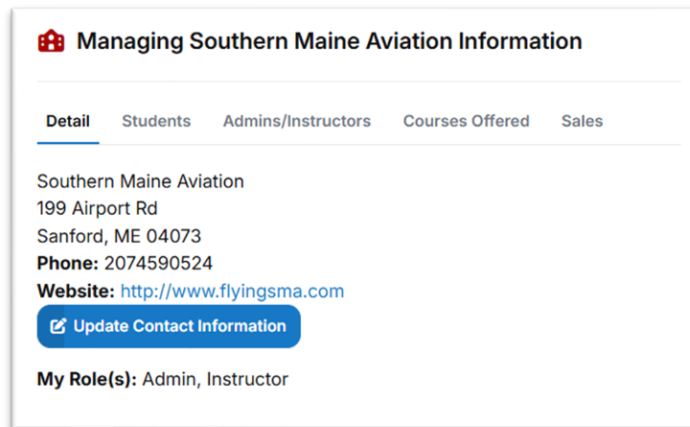
- If you're also an active instructor, “My Teaching” gives you the same student-management tools your CFIs use (Section 4).

### 3. Managing Your Flight School (My Schools)

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Use the My Schools menu to manage your flight school's instructors, sell courses to your students, and review your school's sales history. If you are both a flight instructor and an administrator for your flight school, you'll see the same school-management options under My Teaching as well.

If you select “My Schools” and then “Manage My School” you will see 5 tabs as shown below.



#### Detail

- View and edit your flight school's own profile information.

#### Students

- View every student associated with your flight school.
- Use “View Details” to see a given student's relationship history with your school.

#### Admins / Instructors

- Add new users (instructors or additional administrators) to your flight school.
- Update a user's permissions, or view their activity history, from the Actions menu.

#### Courses Offered

- See which courses your school is authorized by the course developer to teach.
- Add or remove the courses you wish to offer.

If your flight school is in non-revenue mode, the price for each course is fixed, based on the content developer's price plus the platform fee.

If your flight school is in revenue mode, you may mark up each course and earn a margin on every sale. This requires connecting and setting up your Stripe account first.

Once revenue mode is set up, you'll also see a Sale Request button next to each course. This lets you enter a student's email address and place that course directly in their shopping cart. The student receives an email invitation to complete the purchase, and the purchase automatically connects them to your flight school.

*If a student instead purchases the course on their own, they will need to manually authorize your flight school as their instruction provider.*

**Sales**

- Review your flight school's complete sales history in one place.

**4. The Student & Instructor Workflow, at a Glance**

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You don't need to run this workflow yourself, but understanding it will help you support your instructors, review their work, and answer questions. This is the recommended default sequence — individual schools, course structures, and student needs may require adjustments.

| Step | Instructor action                                                        | Where                                          |
|------|--------------------------------------------------------------------------|------------------------------------------------|
| 0    | Review the instructor's dashboard for students and items awaiting input. | Instructor Dashboard                           |
| 1    | Select the student and course.                                           | My Teaching / All Students or Watched Students |
| 2    | Review instructor actions and required compliance items.                 | Instructor To Do                               |
| 3    | Assign or confirm homework expected before the next lesson.              | Instructor To Do / Manage Homework             |
| 4    | Plan the lesson and select expected training activities.                 | Training Sessions / Schedule Training Session  |
| 5    | Conduct the preflight briefing and confirm lesson objectives.            | Training Sessions or Companion App             |
| 6    | Grade activities, add notes, and record required details.                | Training Sessions or Companion App             |
| 7    | Complete or send the flight, then debrief the student.                   | Training Sessions or Companion App             |
| 8    | Review progress and reports to plan the next lesson.                     | Course Map, Course Progress, Reports           |

**Finding students: All Students vs. Watched Students**

All Students shows every student any of your instructors are authorized to instruct — across your whole school. It's the right place to start when you need to find a student regardless of who is currently instructing them, or to fill in for another instructor or a phase check flight.

Drag a column here to group the list by that column

Sort or filter individual columns

Drag a column header here to group its column

|           | First Name ▾ | Last Name ▾ | School ▾ | Course Title ▾                                         | Date Purchased ▾ | Completion Status ▾ | % Complete ▾ | Target Completion ▾ |
|-----------|--------------|-------------|----------|--------------------------------------------------------|------------------|---------------------|--------------|---------------------|
| Actions ▾ |              |             |          | Climb / FAA Private Pilot ASEL                         | 02/22/2026       | In Progress         | 23%          | 05/23/2026          |
| Actions ▾ |              |             |          | ASA/Climb - CMEL - Additional Rating (With Simulation) | 02/19/2026       | In Progress         | 77%          | 03/21/2026          |
| Actions ▾ |              |             |          | The Science of Flying                                  | 09/04/2026       | In Progress         | 15%          | 09/09/2026          |
| Actions ▾ |              |             |          | Sue Private Pilot Airplane SEL                         | 09/02/2026       | In Progress         | 3%           | 12/31/2026          |
| Actions ▾ |              |             |          | ASA/Climb - CMEL - Additional Rating (Airplane Only)   | 12/06/2025       | In Progress         | 15%          | 01/05/2026          |

*All Students: a school-wide roster with sort, filter, and grouping controls, including the School column.*

Watched Students is each instructor's own focused, easy-access list of students they are actively instructing or monitoring — think of it as their personal dashboard for routine lesson prep.

### What your instructors see once inside a student's course

After opening a student's course, instructors move through a set of work tabs:

- Instructor To Do — actions the instructor must review, complete, or sign off (compliance items like medical currency, plus quiz reviews).
- Student To Do (“What's Next”) — work assigned to the student, plus additional items available if they want to work ahead.
- Activity List — every course activity, completed or not, with quiz scores and filtering.
- Homework — items an instructor has intentionally assigned so the student arrives prepared for the next lesson. Scheduling a training session automatically queues up any prerequisites as homework too.

## 5. Planning, Conducting, and Grading Lessons

Instructors build a training session by selecting expected training activities, then use that plan as the structure for the preflight briefing. Individual items can be opened one at a time for full guidance, common errors, and completion standards, and three PDF export options (scoring sheet, content/briefing sheet, or both) are available for printing.

During or after the lesson, instructors open each activity to grade it, record common errors, and add notes — this data collection matters beyond the single lesson: it supports instructor handoffs and helps the school and course author continuously improve instruction.

After the flight, the instructor completes or sends the flight, adds loggable time toward the student's certificate/course requirements, and can add overall lesson notes for the student and for other instructors.

### Instructor Notebook (companion app)

For instructors flying away from reliable internet access, the Instructor Notebook companion app (iOS and Android) supports storing a planned flight to the device, grading offline, and syncing back to Climb TMS once

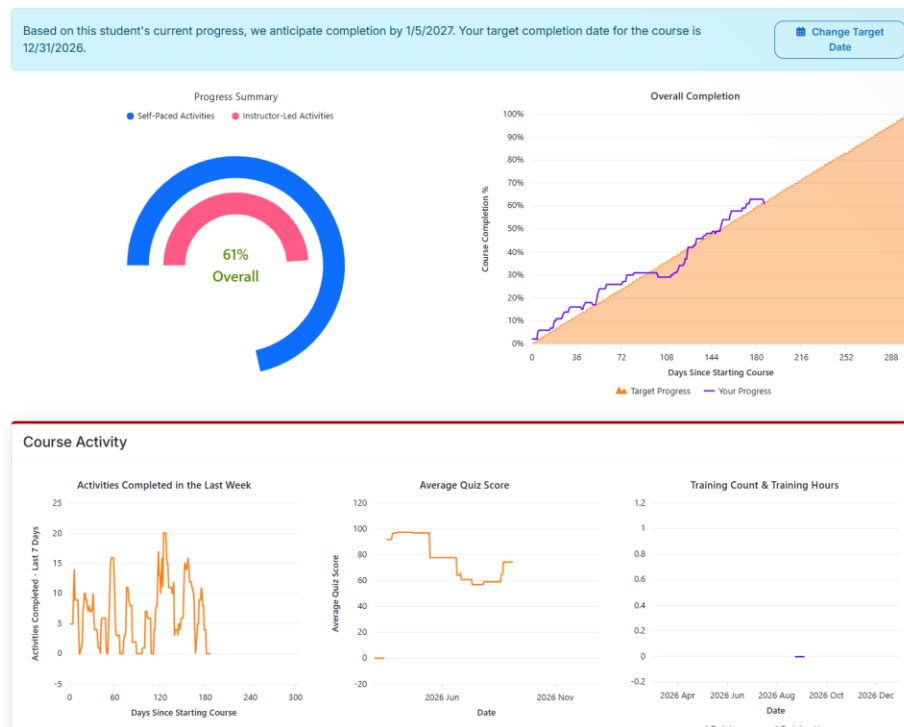
connectivity returns — either finalizing the flight immediately or sending it to the web for a full debrief later on a larger screen.

## 6. Overseeing Progress & Reports

This is where Climb TMS does the most for a chief pilot: it turns individual lesson grades into school-wide visibility.

### Course Progress

- See overall completion status, flight totals, and progress toward course requirements for any student.
- Self-paced activities and instructor-led activities (flights and ground sessions) are tracked separately, alongside an overall completion percentage.
- A completion trendline is compared against each student's own target completion date — useful for spotting a student who is falling behind pace early, rather than at the checkride.



Course Progress: overall completion, a target-vs-actual trendline, and recent activity/quiz-score trends.

### Reports

- Course summary reports confirm required knowledge and training areas have been covered — this is the report to bring to a DPE at checkride time, with dates, instructor name, and regulation reference included.
- Document reports quickly locate uploaded course documents and certificates — handy for a TSA audit or to confirm an endorsement's supporting documentation exists.
- Heatmap and milestone reports highlight strengths and trouble areas over time.

The heatmap is particularly useful for a chief flight instructor: it lets you scan a student's grading history across every maneuver at a glance, spot a pattern of weak grades before it becomes a checkride problem, and quickly get a new or substitute instructor up to speed on where a student actually stands.

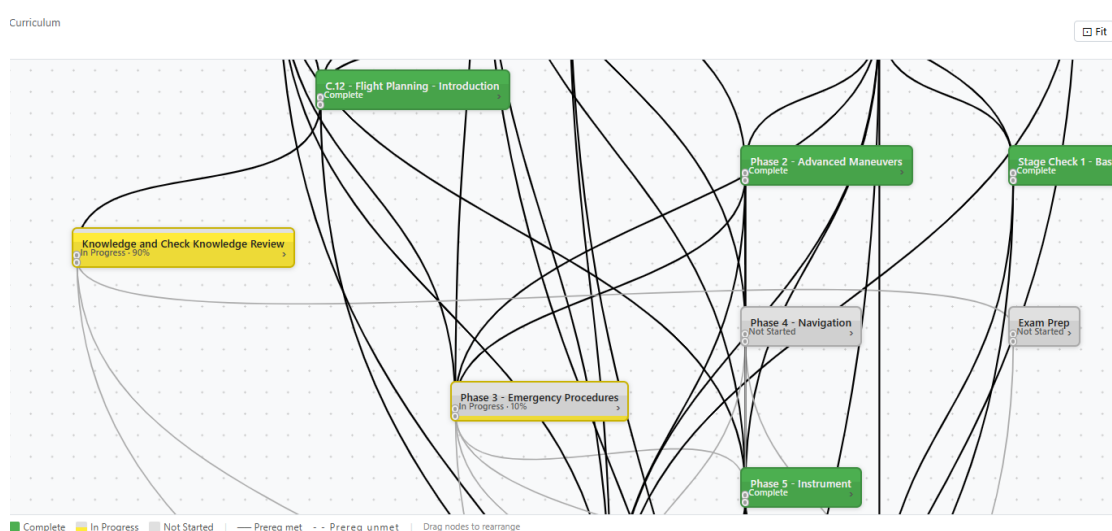
| Flight Info                    | Preflight AC Inspect | Normal TO | Slow Flight | Weight and Balance | Radio Usage | Go-Arounds | P-Off Stall | Power-On Stalls | Steep Turns | Rect Course | Turns Ard Point | S Turns | Normal Landing | Slips |
|--------------------------------|----------------------|-----------|-------------|--------------------|-------------|------------|-------------|-----------------|-------------|-------------|-----------------|---------|----------------|-------|
| 03/08/2026 - Susan Tholen      | 2                    | 2         | 2           | -                  | -           | -          | -           | -               | -           | -           | -               | -       | -              | -     |
| 03/22/2026 - Susan Tholen      | -                    | -         | -           | 2                  | -           | -          | -           | -               | -           | -           | -               | -       | -              | -     |
| 03/29/2026 - Susan Tholen      | 3                    | 2         | 3           | 2                  | 2           | -          | -           | -               | -           | -           | -               | -       | -              | -     |
| 04/05/2026 - Robert Montgom... | -                    | -         | -           | 4                  | -           | -          | -           | -               | -           | -           | -               | -       | -              | -     |
| 04/25/2026 - Susan Tholen      | 4                    | 3         | 4           | 4                  | 2           | -          | -           | -               | 3           | -           | -               | -       | -              | -     |
| 04/26/2026 - Susan Tholen      | -                    | 3         | -           | -                  | 2           | -          | 2           | -               | -           | 2           | -               | -       | -              | -     |
| 05/01/2026 - Susan Tholen      | -                    | 3         | -           | -                  | -           | -          | -           | -               | -           | 3           | 3               | 3       | -              | -     |
| 05/17/2026 - Susan Tholen      | 4                    | 4         | -           | -                  | 3           | 3          | -           | 2               | -           | -           | -               | -       | -              | -     |
| 05/17/2026 - Susan Tholen      | -                    | 4         | -           | -                  | 3           | -          | 3           | -               | 4           | -           | -               | -       | -              | -     |
| 05/17/2026 - Susan Tholen      | 4                    | 5         | 4           | -                  | 4           | 4          | 3           | 4               | -           | -           | -               | -       | 2              | -     |
| 06/01/2026 - Susan Tholen      | -                    | -         | -           | -                  | -           | -          | -           | -               | -           | 4           | -               | -       | 3              | -     |
| 06/07/2026 - Susan Tholen      | 4                    | -         | -           | -                  | -           | -          | -           | -               | -           | -           | -               | -       | -              | -     |
| 06/13/2026 - Susan Tholen      | -                    | -         | -           | -                  | 4           | -          | -           | -               | -           | -           | -               | -       | 3              | -     |
| 06/14/2026 - Susan Tholen      | -                    | -         | -           | -                  | -           | -          | -           | -               | -           | -           | -               | -       | 4              | -     |
| 06/28/2026 - Susan Tholen      | -                    | -         | -           | -                  | -           | -          | -           | -               | -           | -           | -               | -       | -              | -     |
| 07/03/2026 - Susan Tholen      | -                    | -         | -           | -                  | 5           | -          | -           | -               | -           | -           | -               | -       | 4              | -     |
| 07/05/2026 - Susan Tholen      | 5                    | -         | 5           | 5                  | -           | -          | 4           | -               | -           | 5           | -               | -       | -              | 4     |
| 07/11/2026 - Susan Tholen      | -                    | -         | -           | -                  | -           | -          | -           | -               | -           | -           | -               | -       | 4              | -     |
| 07/19/2026 - Susan Tholen      | -                    | -         | -           | -                  | -           | 4          | -           | -               | -           | -           | -               | -       | -              | -     |
| 07/27/2026 - Susan Tholen      | -                    | -         | -           | -                  | 4           | -          | -           | -               | -           | -           | -               | -       | 4              | -     |

Sample grading heatmap: every graded flight activity by date, color-coded by score.

## 7. Understanding Course Structure

Courses can contain many small activities so instructors have flexibility in assigning, tracking, and grading. When a course feels complex, or you want to see one student's specific path through it, use the interactive Course Map.

- Review prerequisites before assigning or scheduling an activity.
- See the broader course structure, including stages, phases, and course-author groupings.
- Drag items to rearrange the view, or click into an item to drill into its contents.
- Yellow boxes show percent complete; solid arrows show met prerequisites, dashed arrows show unmet prerequisites.



*Interactive Course Map: course structure, stages/phases, and one student's completion status and prerequisites.*

## 8. Customizing an Existing Course for Your School

Most schools don't need to build a course from scratch. Climb TMS courses can be copied and customized to match your syllabus, aircraft, and local procedures — this section is a short, high-level summary of that process.

**NOTE** For complete instructions — including screenshots of the Course Authoring screens and exact steps for editing prerequisites, grade levels, and content — please review the full “How to Create a Course on Climb TMS – Flight School” guide.

### Decide how much to change

| Level                      | Best when                                                                  | Typical changes                                                                                                           |
|----------------------------|----------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Light customization</b> | The existing course mostly matches your syllabus.                          | Add aircraft notes, local procedures, and instructor guidance; adjust a few prerequisites or the grading rubric.          |
| <b>Moderate adaptation</b> | The course is useful but doesn't fully match your sequence or terminology. | Reorder items, add or replace content, adjust prerequisites, add school-specific homework and documents/videos.           |
| <b>Significant rebuild</b> | Your school has a distinct syllabus or training model.                     | Use the course as a starting point but revise stages, lessons, and groupings — or build a new course from a content pack. |

### How courses are structured

- Courses are built from Modules > Units > Activities. Activities include instructor actions (e.g. TSA validation, endorsements), knowledge items, quizzes, and training activities (ground, simulator, or flight).

- Prerequisites can require a specific grade level, not just completion — for example, slow flight might need a grade of 3 before stalls unlock, without requiring full proficiency.
- Under Course Authoring, use View Course Outline for a flat list of every activity, or Manage Course to work two levels at a time and edit prerequisites, grade levels, sequencing, and content.

### Who owns what

- Use a course as-is, and the original course author keeps its content current as regulations and guidance change.
- Customize a course, and a school-owned copy is created. You're responsible for keeping your own additions current; content sourced from a “content pack” stays maintained by that pack's owner.

### Recommended workflow

Select an existing course as a starting point → request a school-specific copy → review the course map, prerequisites, and completion requirements → make edits in small, documented batches → test as both instructor and student → train your instructor team → publish.

### Typical customizations

- Aircraft-specific videos, checklists, speeds, and limitations.
- Local airport, airspace, weather, and risk-management guidance.
- School-specific policies, endorsements, documents, quizzes, and instructor actions.
- Adjusted sequencing, prerequisites, and grading rubrics to match how your instructors already teach.

## 9. My Account

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- Update your profile, change your password, and set your 4-digit security PIN.
- Identify yourself as an instructor and submit a request to instruct on Climb TMS, if you aren't already authorized within an existing flight school.

## 10. Best Practices for Chief Pilots

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1. Review heatmaps periodically, not just at checkride time. A pattern of orange/red grades on the same maneuver across students can point to a training-standardization gap rather than a single student's weak spot.
2. Use target completion dates as an early-warning system. A student consistently falling behind their own trendline is worth a check-in long before it becomes a completion crisis.
3. Pull the course summary report before every checkride recommendation, not just when a DPE asks — it's the fastest way to confirm every required item, date, and instructor sign-off is actually there.
4. Use the course map for instructor handoffs. When a student changes instructors, the map and the heatmap together give a new CFI a fast, accurate picture of where the student really stands.

5. Encourage instructors to record common errors and notes, not just grades. That data is what makes reports and heatmaps useful later — a bare numeric grade with no context is much less useful in six months.
6. Remember Climb TMS assists instructors, it doesn't replace them. The task list in a training session is for tracking and grading; the instructor still owns the lesson's scenario, objective, and risk-management discussion.

## 11. Frequently Asked Questions

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### **Can I edit or build a course for my specific flight school?**

Yes. Most schools start by customizing a copy of an existing course rather than building from a blank slate — see Section 8 for a summary, or the full “How to Create a Course on Climb TMS” guide for step-by-step instructions. If you'd rather start from scratch, the Climb team can also help you become a content developer and build an entirely new course.

### **How does Climb integrate with flight school scheduling software?**

This is a work in progress. Climb is built with simple integration points in mind, so schools can keep their choice of scheduling, syllabus, and billing/invoicing software. API options support integration with many systems, and single sign-on with select partners is in development.

### **What tools exist for a chief pilot to get an overview of all students' progress?**

A dedicated flight-school-wide dashboard is still in development. In the meantime, Course Progress and Reports (Section 6) — especially the heatmap and course summary report — are the best school-wide oversight tools available today. Submit requests for specific metrics or visuals through the in-app Feedback button.

### **Can an instructor teach a course but override the required flight-experience values?**

Yes. Required experience values reflect Part 141 or Part 61 requirements based on the selection made at course enrollment, but course totals are not currently enforced by the software. Courses include a required instructor action step to confirm all required flight experience and endorsements are present before the course can be completed.

### **Some flight activities are really ground activities. Why the confusion?**

A future version will use “dual instructional activities” to distinguish self-paced knowledge/quiz items from items that require an instructor or aircraft (including solo flights), with ground-only, simulator-only, simulator-or-aircraft, and aircraft-only categories. For now, the activity title indicates whether an item is an instructor-led ground activity or an actual in-flight activity.

### **What happens if an instructor bypasses prerequisites?**

The item becomes immediately available — for the student to complete, if self-paced, or for the instructor to perform and grade in flight, if instructor-led.

### **Do instructors need to manually assign homework for every flight or training activity?**

No. Prerequisites for items selected in a training session are added to the student's homework automatically. Encourage instructors to stay one or two sessions ahead of the student (ideally one ground session and one flight) so homework is always queued up in advance.

**Can students or instructors skip activities entirely?**

Yes, in some cases — for example, VOR training activities in a course when a particular airplane has no VOR installed. Any activity the course author has marked skippable can be skipped with a reason entered; otherwise it's mandatory for course completion.