

How to Change an Invoice Date

Quick Reference Guide

NOTE: Access to the following abilities are restricted based on the user's rights set up via the Team Management page in OrthoFi.

How to Change an Invoice Date

Need help? View How to [Read the Ledger](#).

1. Locate the **Patient Responsibility** section in the **Ledger**
2. Click the **three-dot menu (⋮)** then **Manage Invoices**

Ledger

Contract (1) Braces 06/16/2026 [VIEW CONTRACT](#)

\$3,380.00 Total Treatment

\$146.12 on 08/10/26 Next Payment [ON](#)

\$0.00 Past Due Amount ⓘ

PATIENT RESPONSIBILITY

Treatment Cost	\$ 3,380.00
Adjustments, Accrued Interest & Fees	\$ 0.00
Expected	\$ 3,380.00
Received	\$ 1,300.00
Remaining	\$ 2,080.00

INSURANCE BENEFITS

Original Estimate	\$ 0.00
Insurance Adjustments	\$ 0.00
Expected	\$ 0.00
Received	\$ 0.00
Remaining	\$ 0.00

PATIENT RESPONSIBILITY **INSURANCE**

[EXPORT](#) [MAKE A PAYMENT](#) [⋮](#)

Manage Invoices

- Manage Payment Method
- Manage Fees
- Add Cost/Courtesies
- View Communications
- Refinance Contract
- Write Off/Dismissal
- Reinstate Contract

3. Click **Edit**. Then, complete one of the following:
 - Change individual invoice date:** Click the **calendar icon** next to the invoice to select a new date
 - Change auto payment date:** Click **Edit Monthly Due Date**, select the day of the month, then click **Enter**
 - Bring past due invoices current:** Click **Move Schedule** then select an upcoming month, then click **Enter**
4. At the bottom of the screen, select an option for Requested By and add an adjustment reason
5. Click **SAVE** to implement changes

Adjustment Summary as of 7/17/2026 [PRINT](#) [EDIT](#)

Balanced: \$0.00

Due Date	Payment Type	Status	Amount	Amount Paid	Remaining Balance
7/24/2026	Down Payment	In Progress	\$750.00	\$750.00	\$0.00

Adjustment Summary as of 7/17/2026 [SUSPEND CONTRACT](#) [MOVE SCHEDULE](#) [EDIT MONTHLY DUE DATE](#)

Balanced: \$0.00

Requested By: Associate Doctor

Patient needed more time due to a delayed paycheck.

[CANCEL](#) [SAVE](#)

* Required Fields