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June 2020

## Bone fusion system

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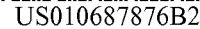
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(10) **Patent No.:** US 10,687,876 B2  
(45) **Date of Patent:** Jun. 23, 2020

in the disc space. The screws and cage may be combined for improved fixation with minimal invasiveness.

#### 46 Claims, 38 Drawing Sheets

#### Related U.S. Application Data

- No. 14/347,442, filed as application No. PCT/US2012/058968 on Oct. 5, 2012, now Pat. No. 9,820,788.
- (60) Provisional application No. 61/543,482, filed on Oct. 5, 2011.
- (51) **Int. Cl.**  
*A61F 2/44* (2006.01)  
*A61F 2/30* (2006.01)  
*A61F 2/28* (2006.01)
- (52) **U.S. Cl.**  
 CPC ..... *A61B 17/8635* (2013.01); *A61B 17/8665* (2013.01); *A61B 17/8685* (2013.01); *A61F 2/447* (2013.01); *A61F 2/4455* (2013.01); *A61B 17/8625* (2013.01); *A61F 2002/2835* (2013.01); *A61F 2002/3027* (2013.01); *A61F 2002/3055* (2013.01); *A61F 2002/30153* (2013.01); *A61F 2002/30354* (2013.01); *A61F 2002/30405* (2013.01); *A61F 2002/30471* (2013.01); *A61F 2002/30479* (2013.01); *A61F 2002/30492* (2013.01); *A61F 2002/30505* (2013.01); *A61F 2002/30556* (2013.01); *A61F 2002/30565* (2013.01); *A61F 2002/30579* (2013.01); *A61F 2002/30772* (2013.01); *A61F 2002/30904* (2013.01); *A61F 2002/4475* (2013.01)
- (58) **Field of Classification Search**  
 CPC ..... *A61B 17/8685*; *A61B 17/8625*; *A61F 2/4425*; *A61F 2/4455*  
 See application file for complete search history.

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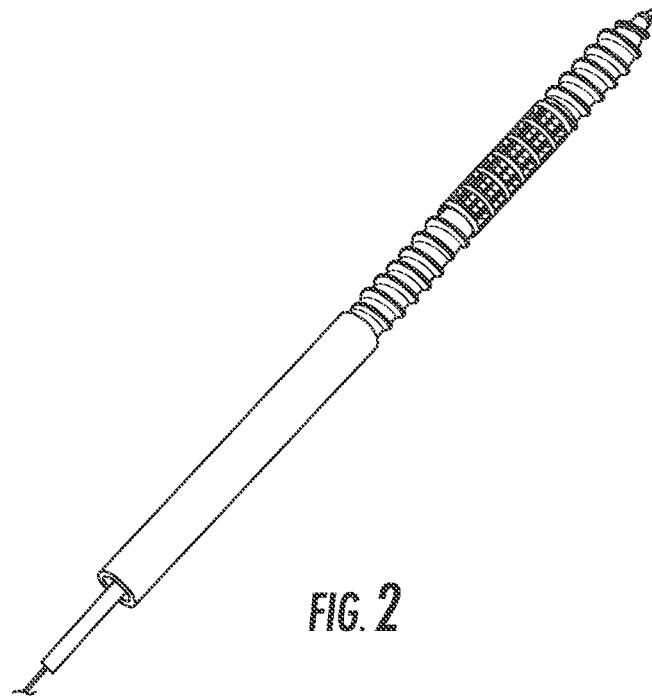
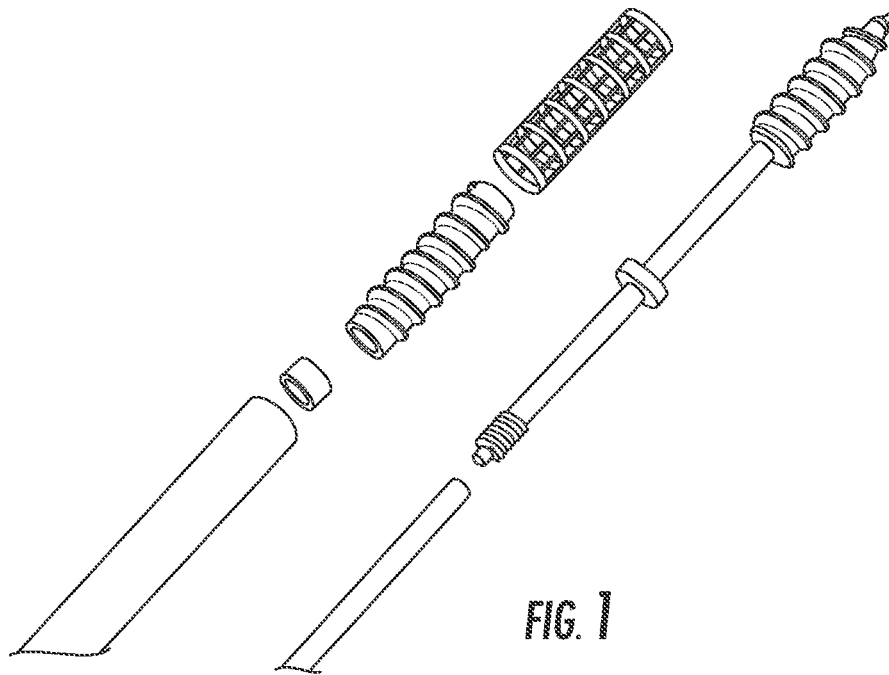
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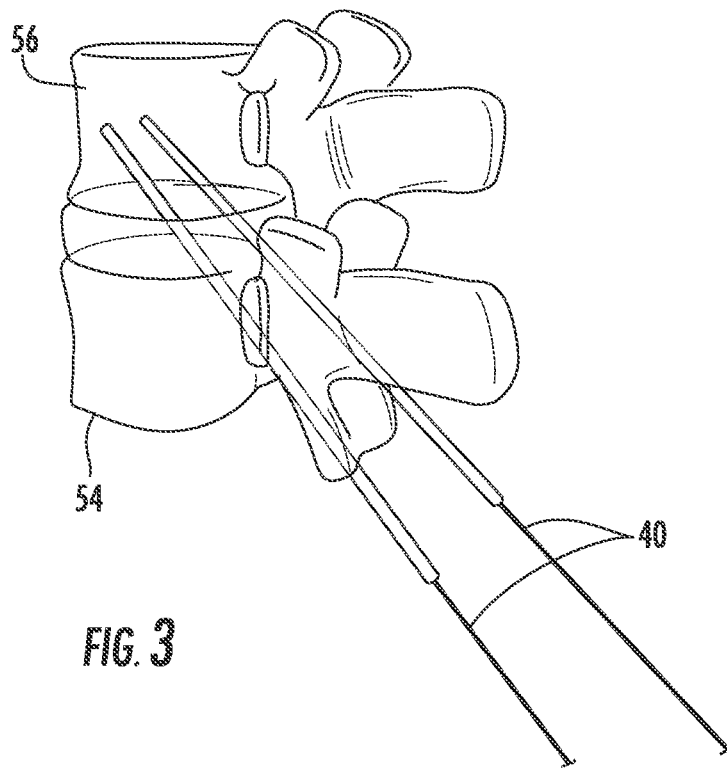


FIG. 3

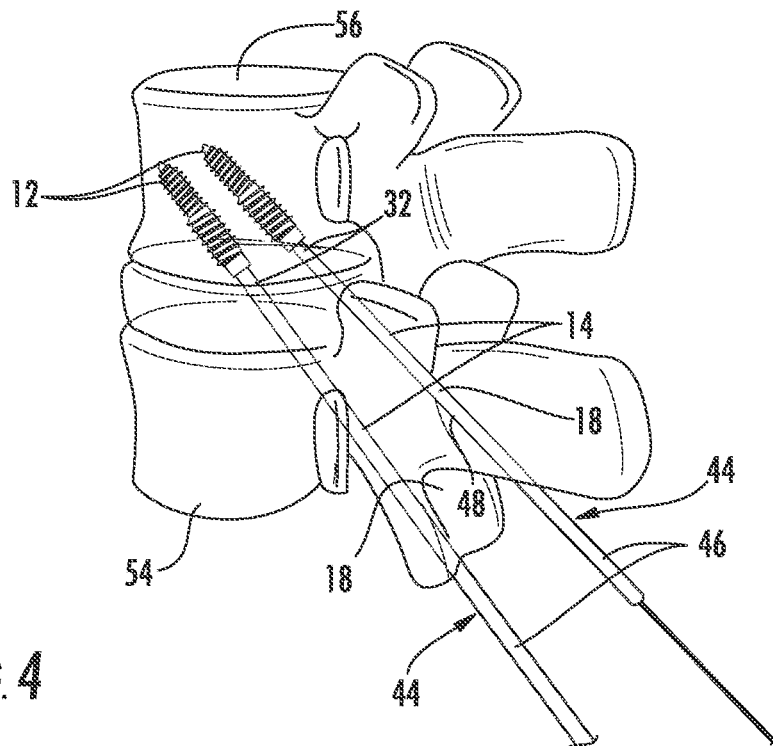


FIG. 4

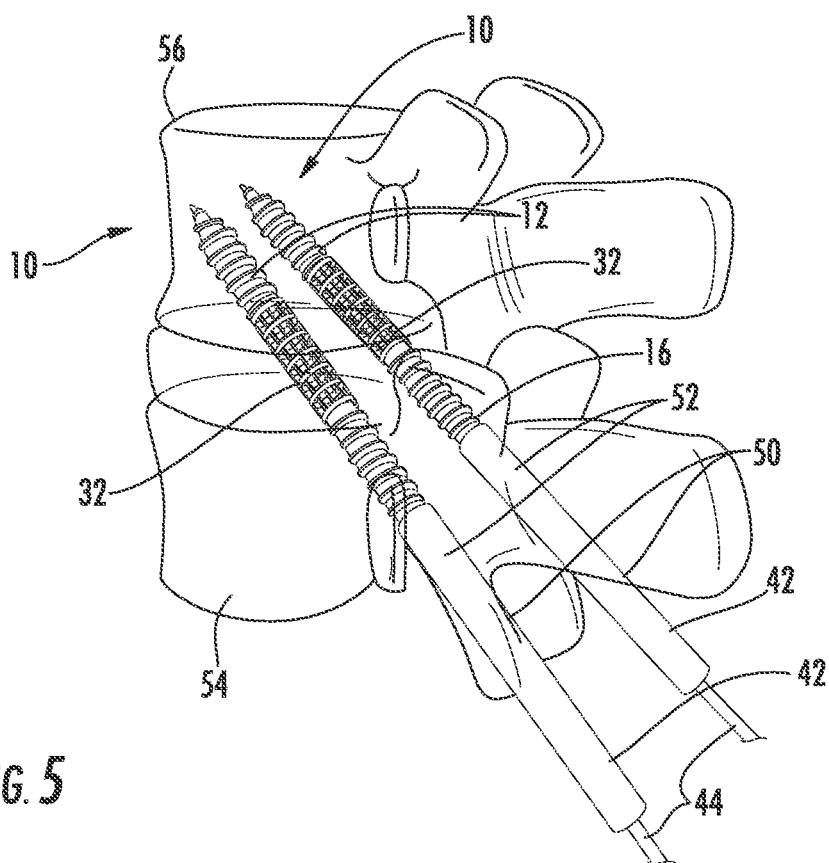


FIG. 5

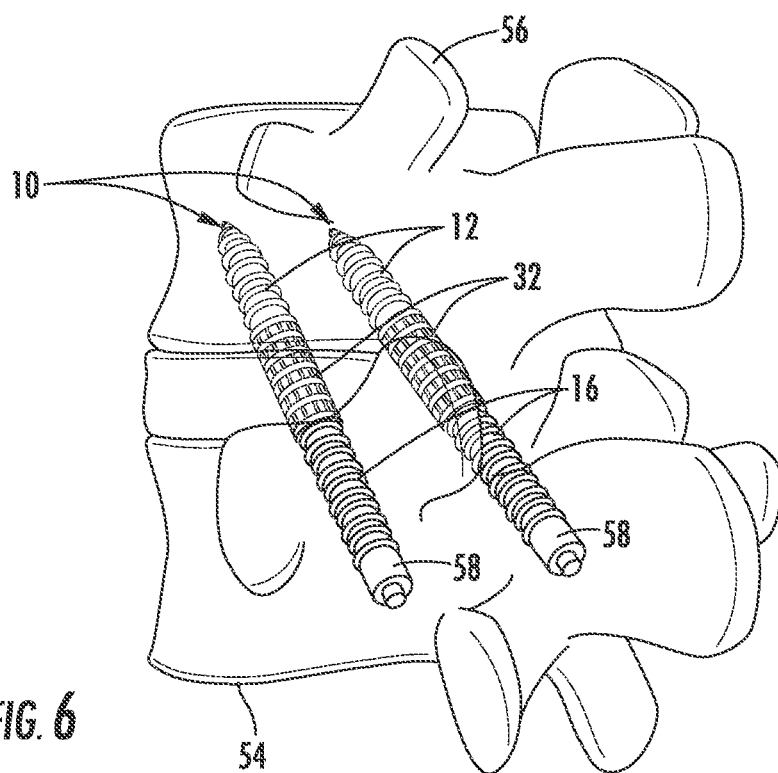


FIG. 6

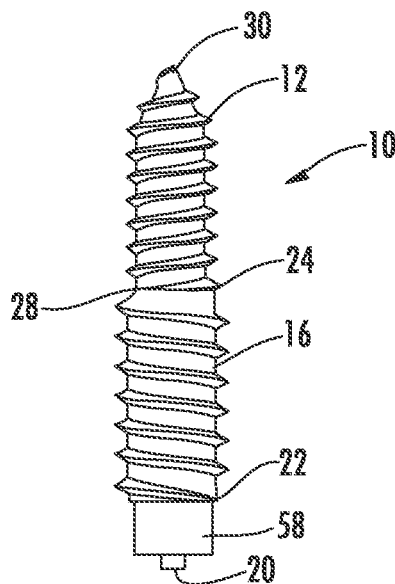


FIG. 7

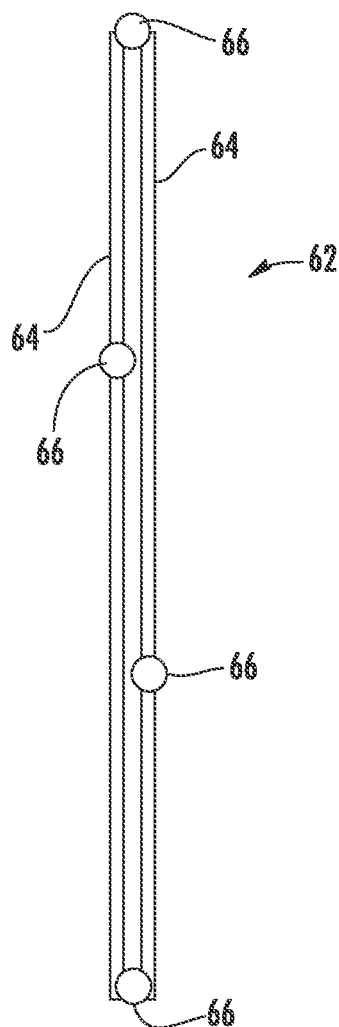
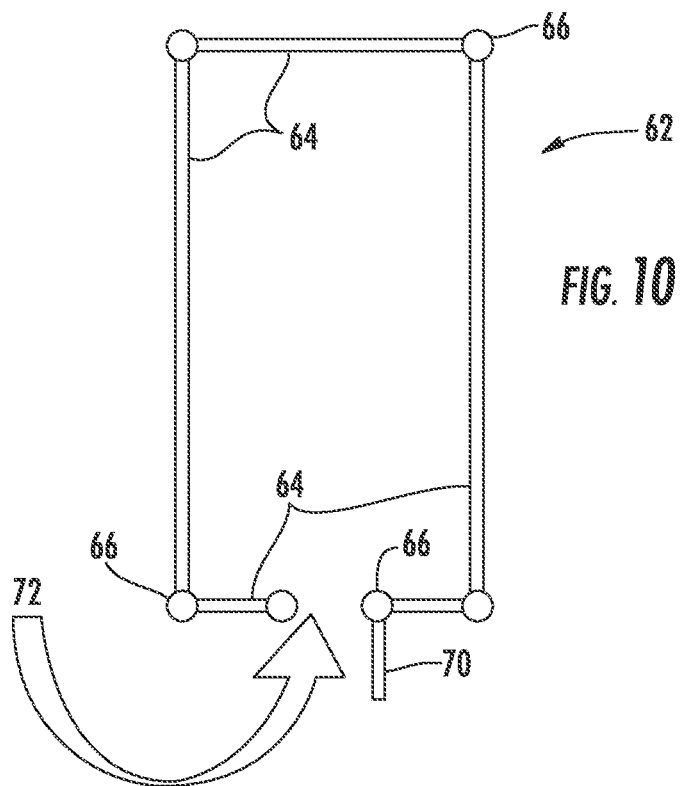
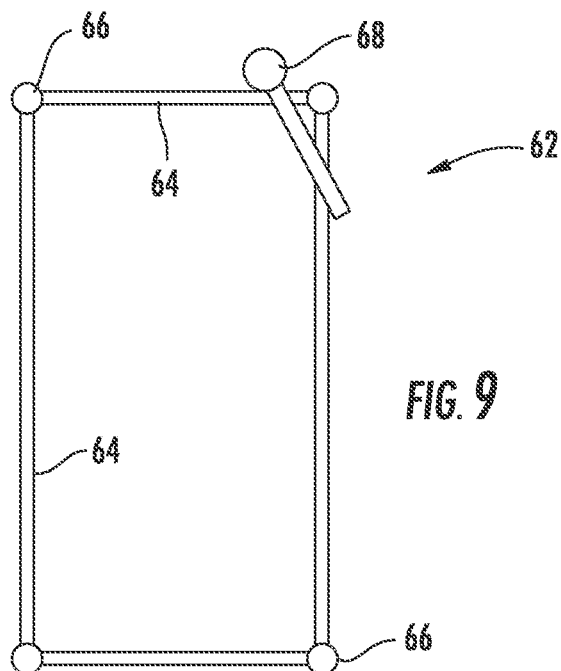


FIG. 8





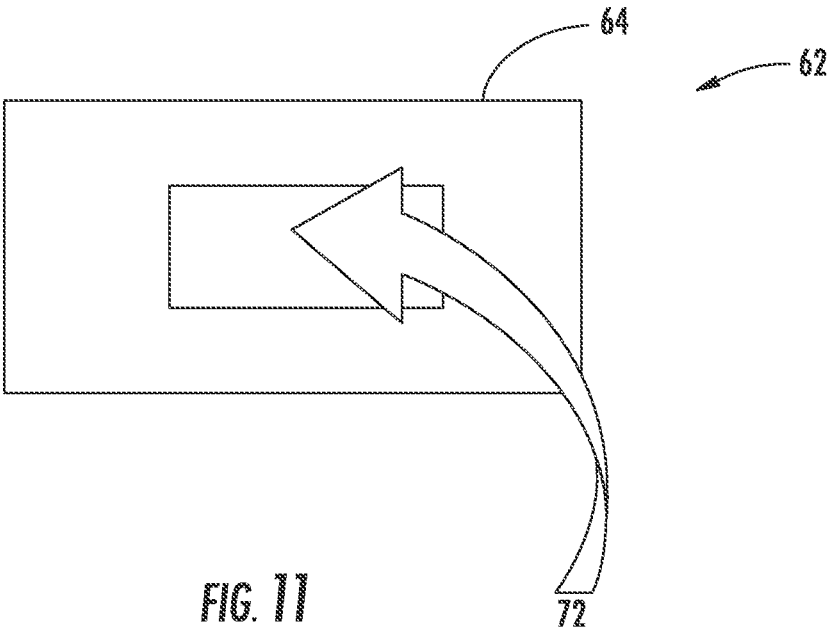


FIG. 11

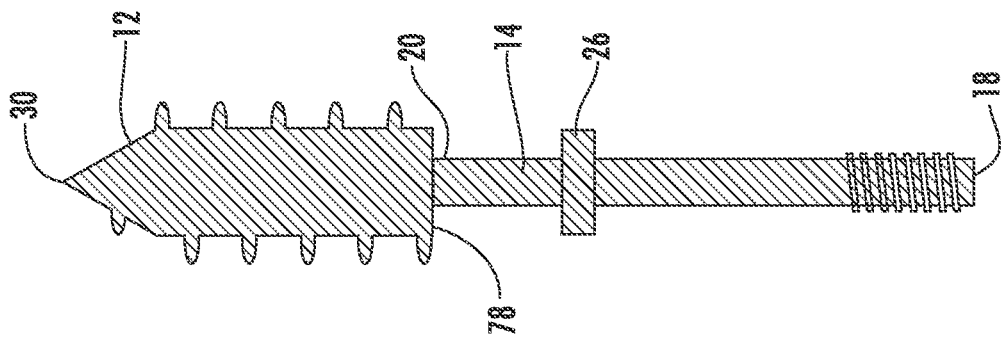


FIG. 12

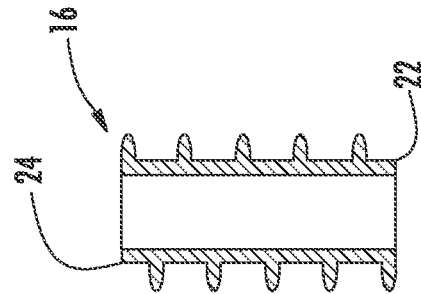


FIG. 13

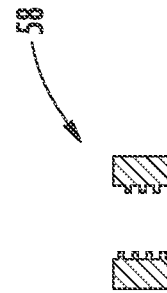
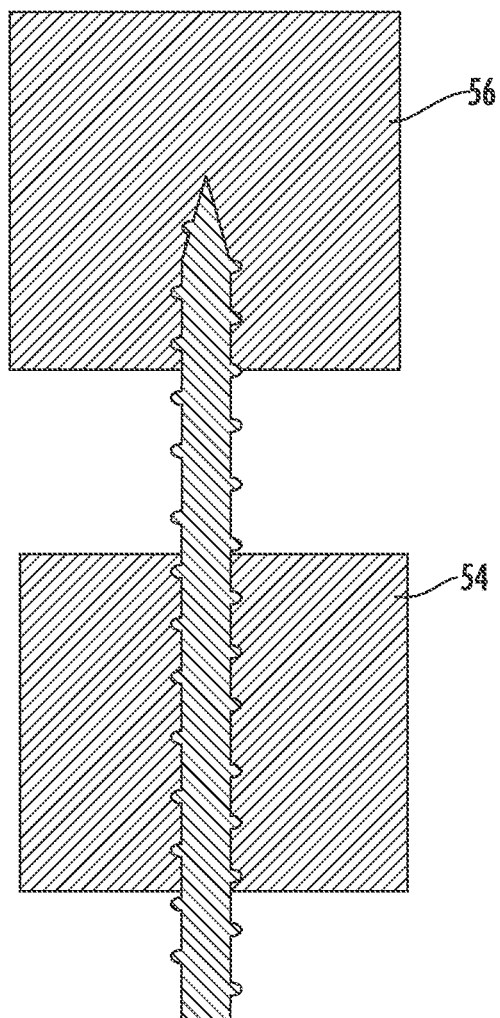


FIG. 14



**FIG. 15**

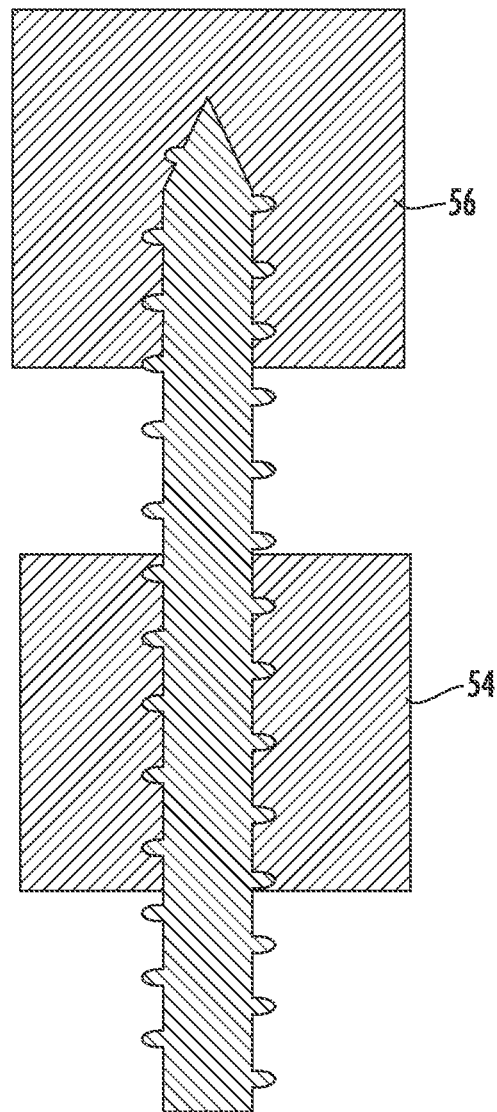
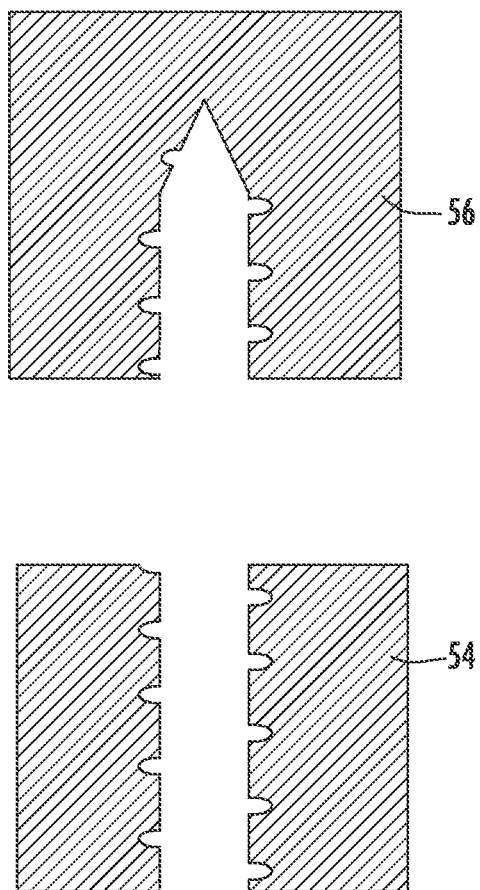
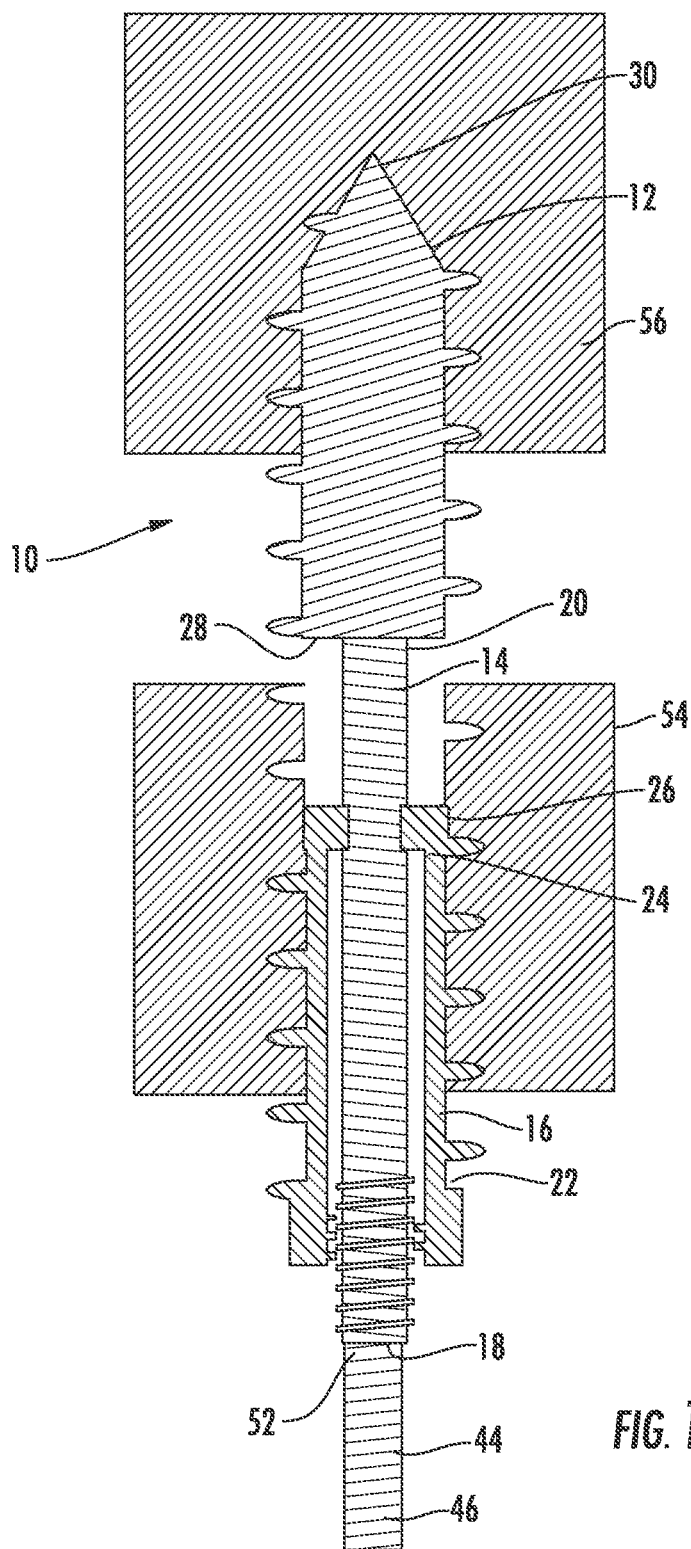


FIG. 16





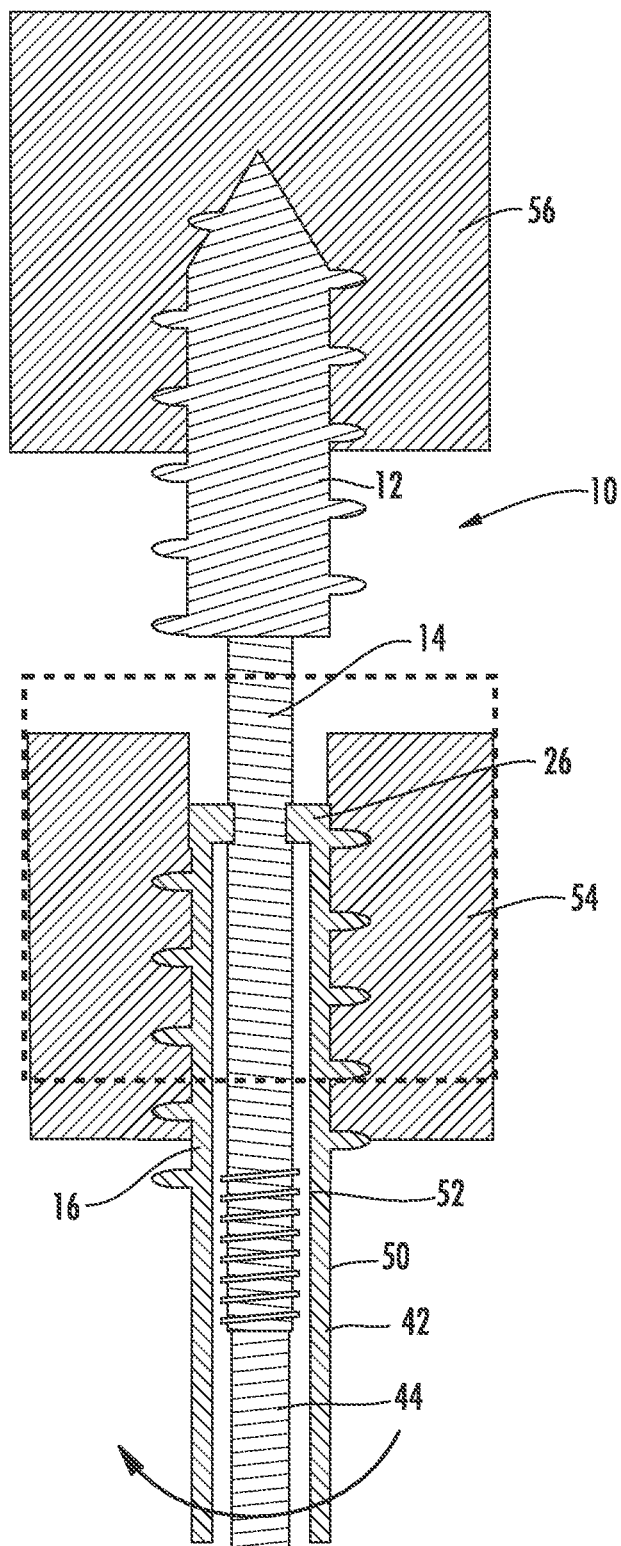
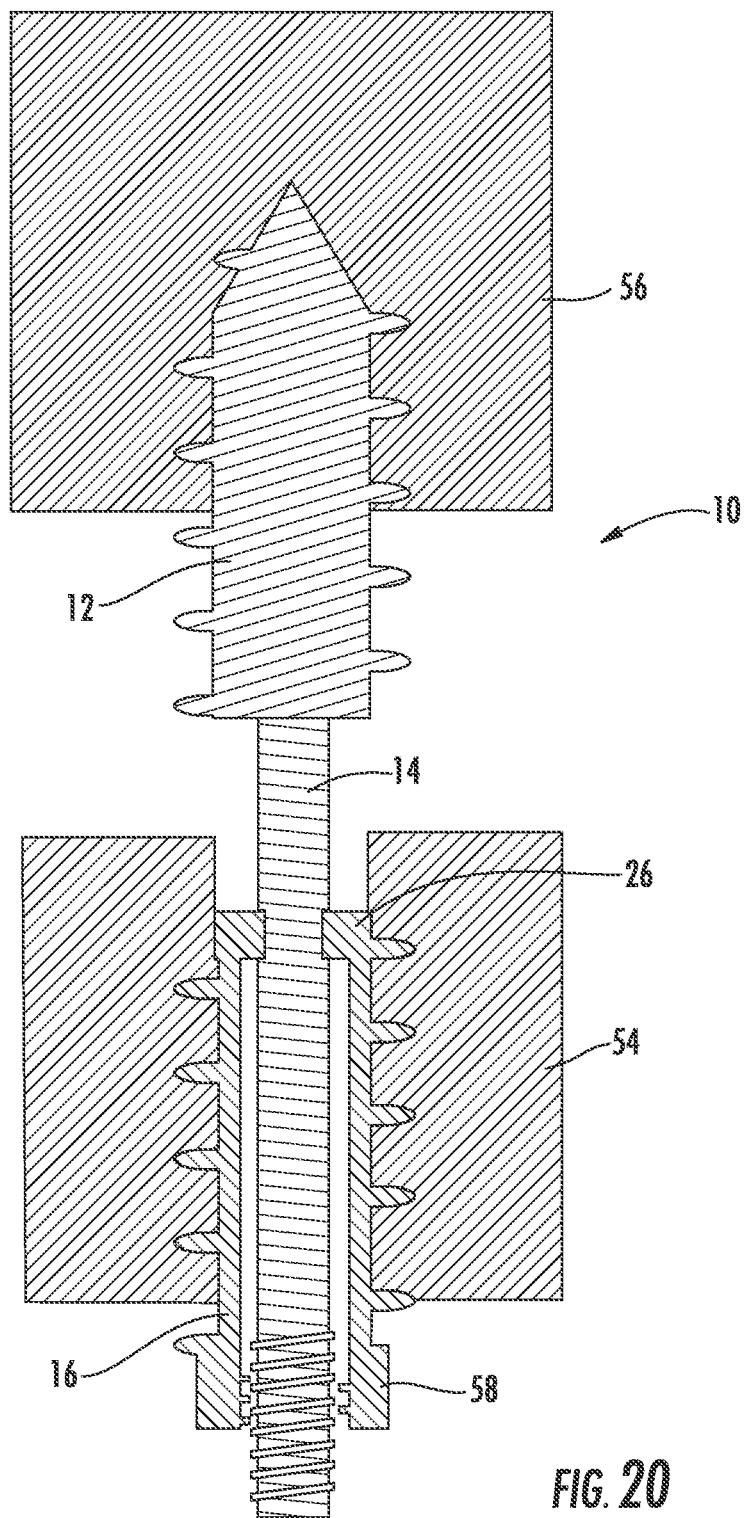
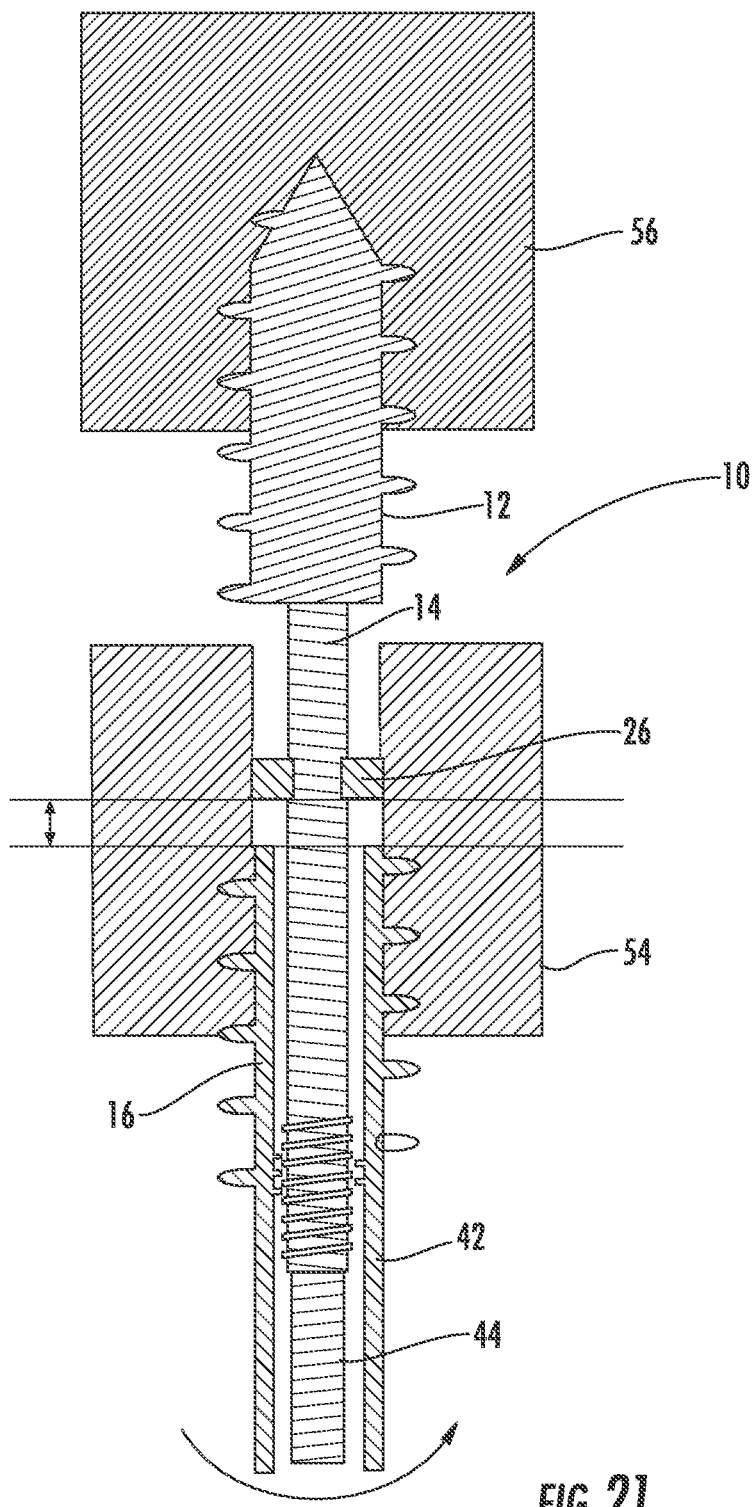


FIG. 19







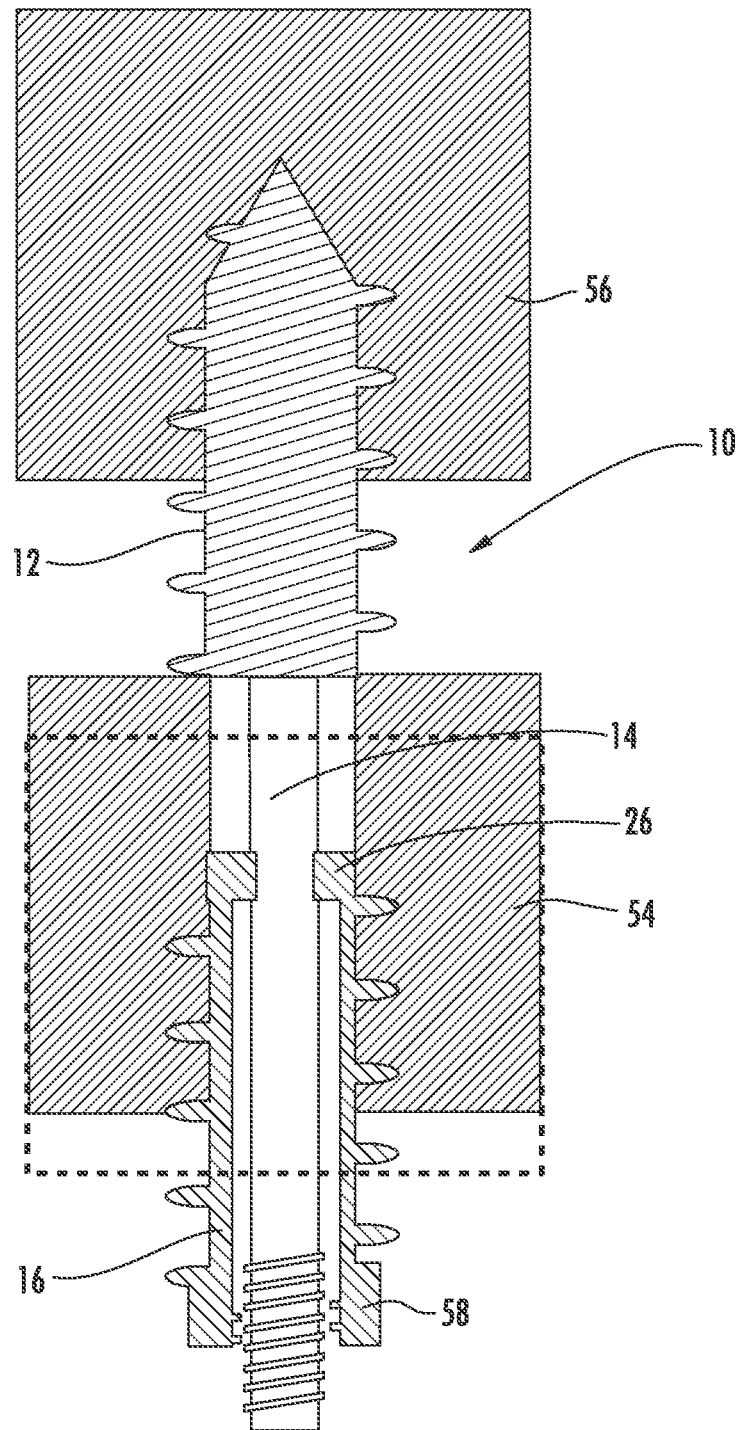
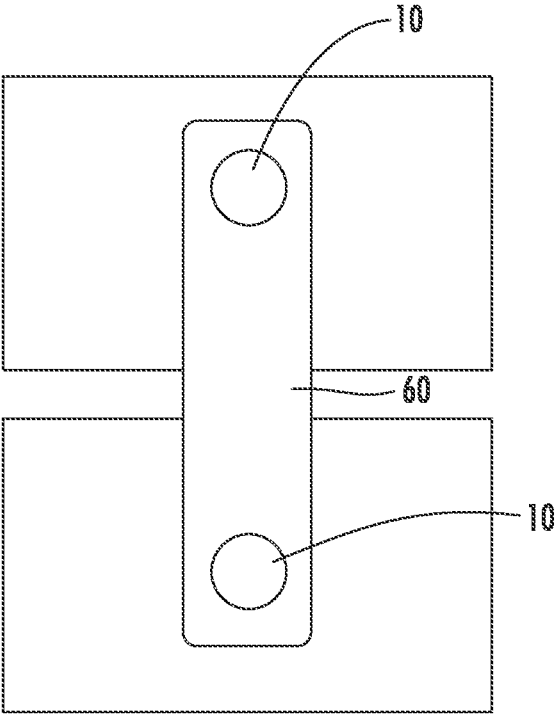


FIG. 22



**FIG. 23**

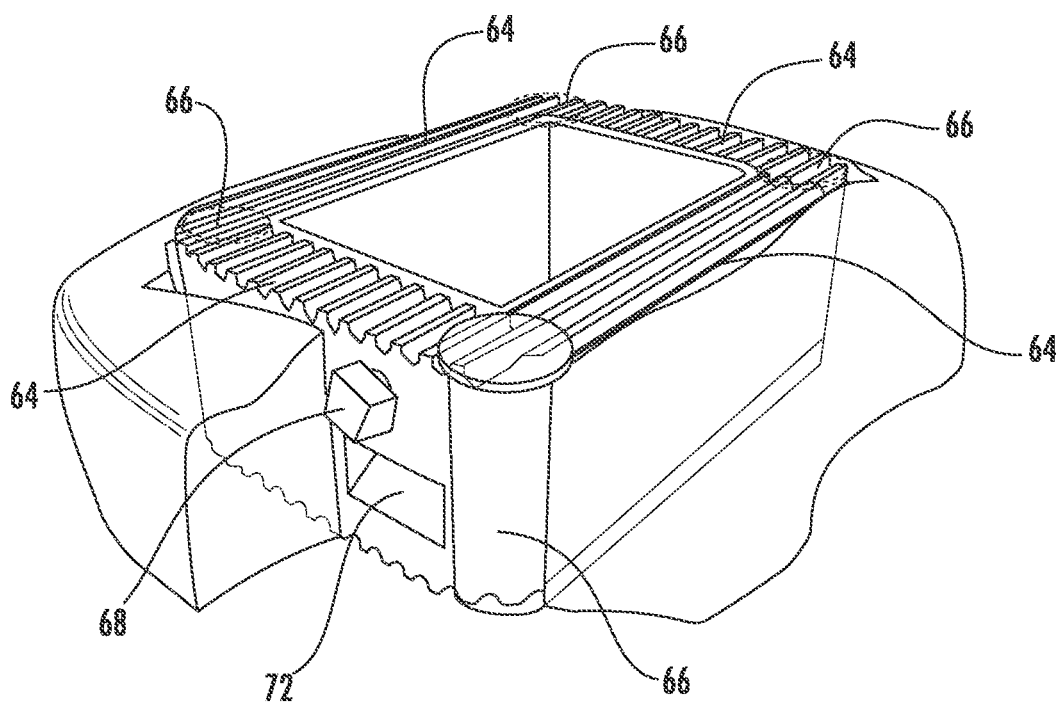


FIG. 24

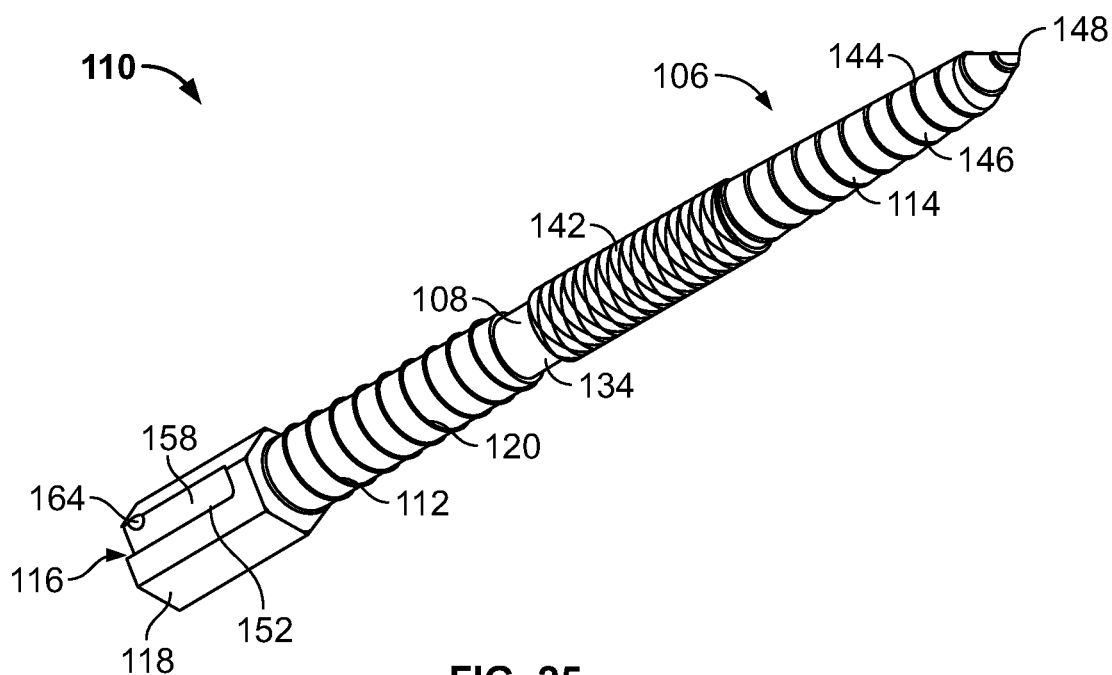


FIG. 25

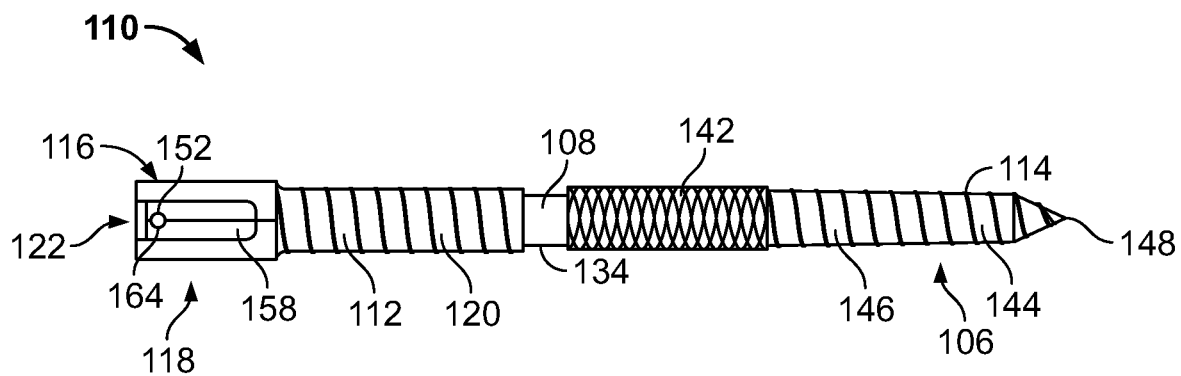
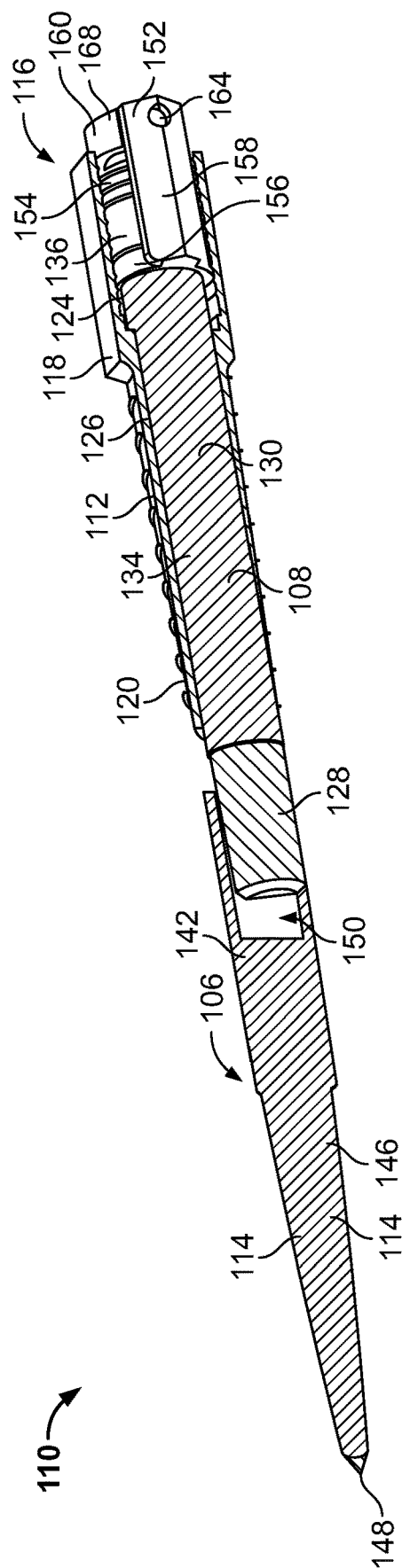


FIG. 26



**FIG. 27**

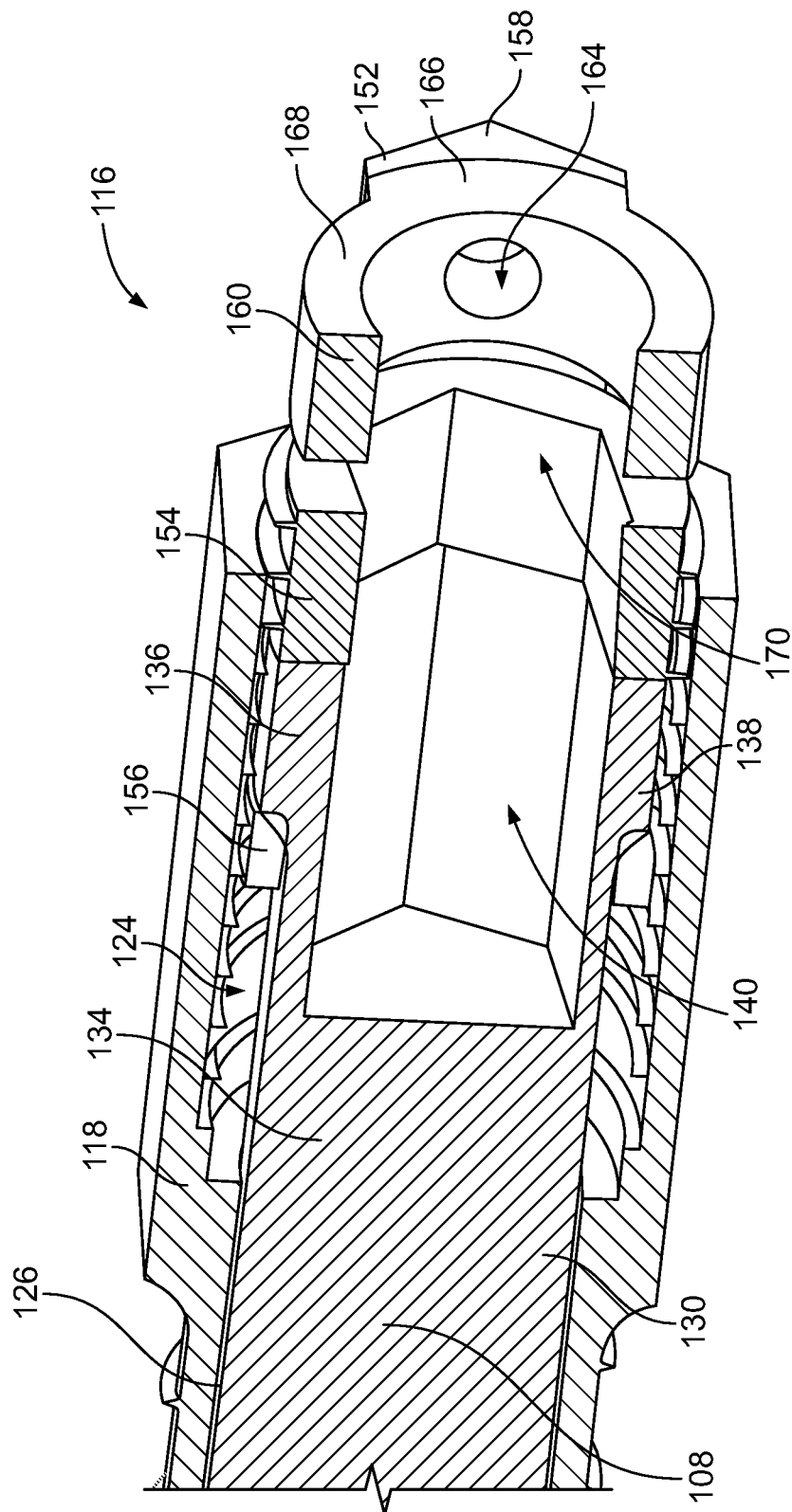


FIG. 28

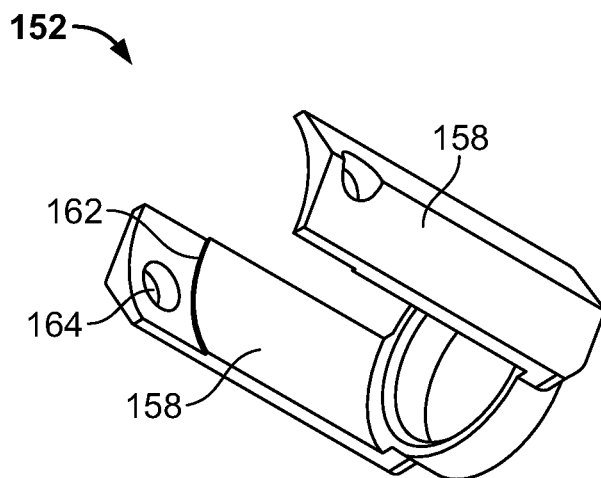


FIG. 29

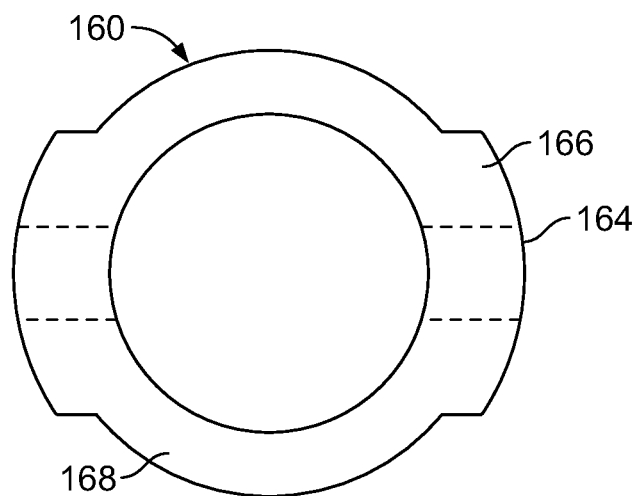


FIG. 30



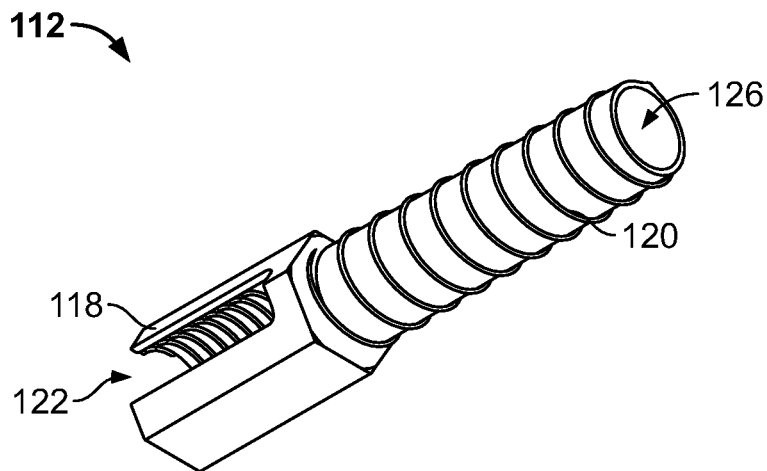


FIG. 31

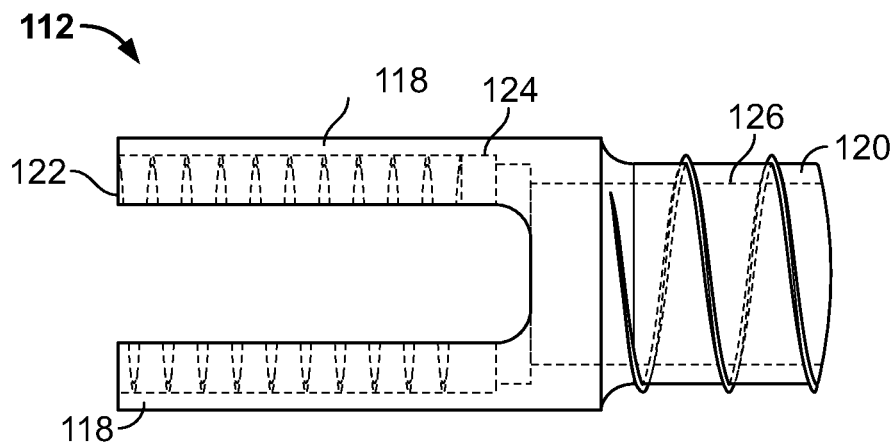


FIG. 32

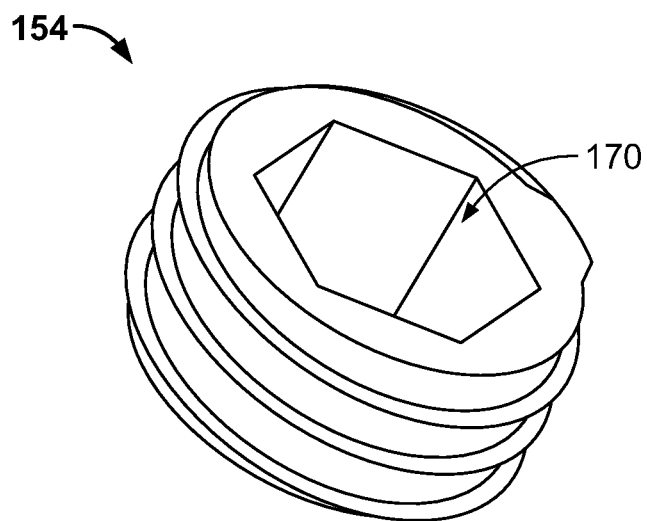


FIG. 33

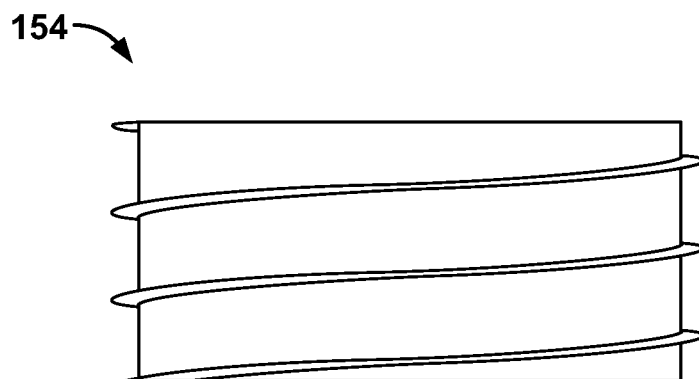


FIG. 34

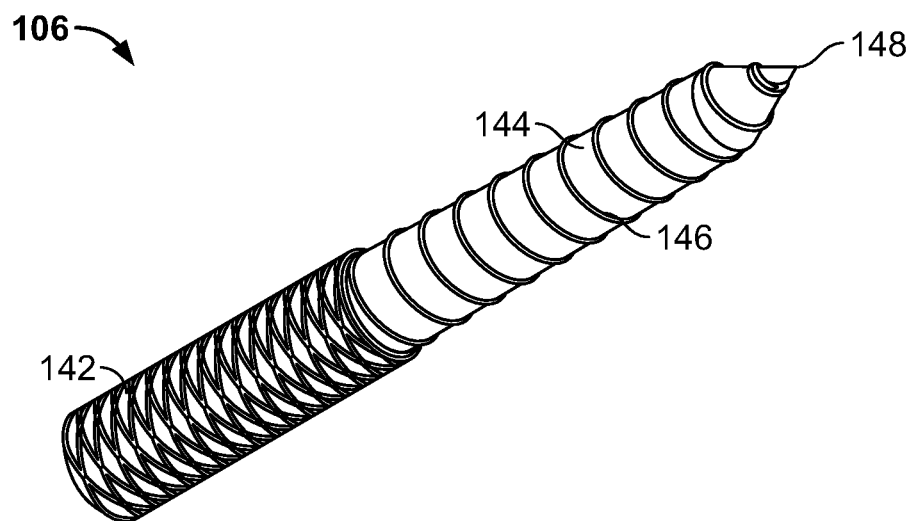


FIG. 35

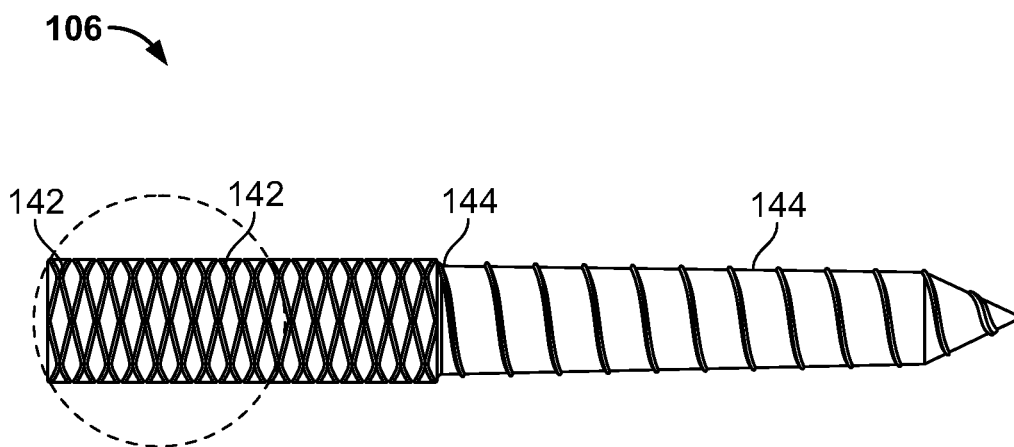


FIG. 36

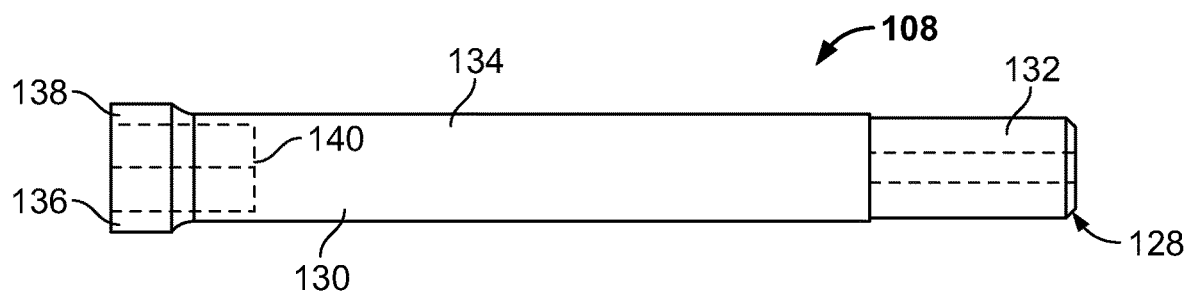


FIG. 37

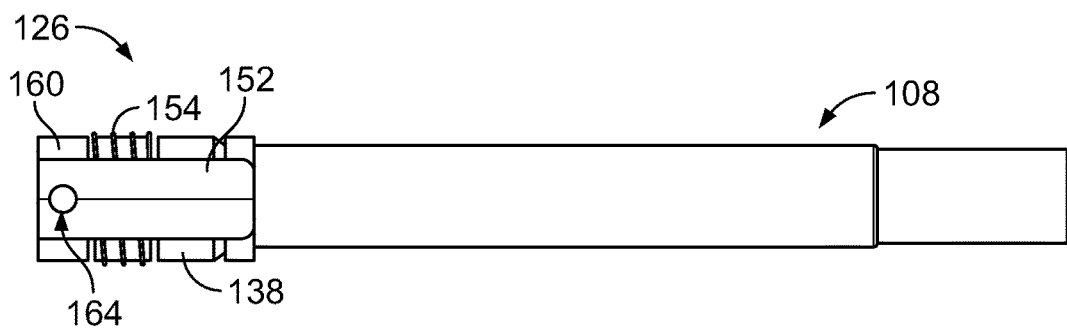


FIG. 38

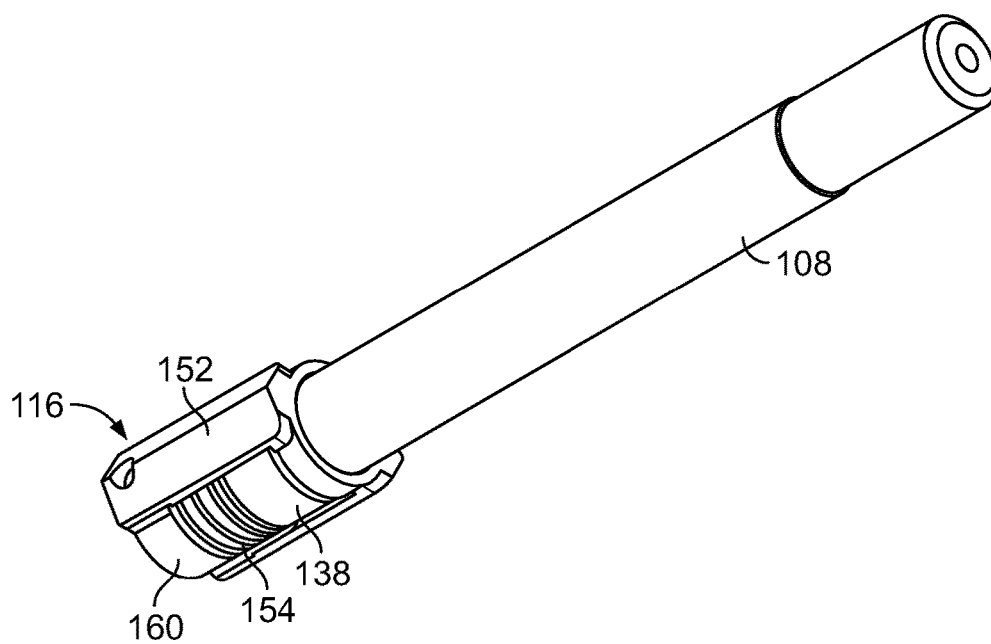


FIG. 39

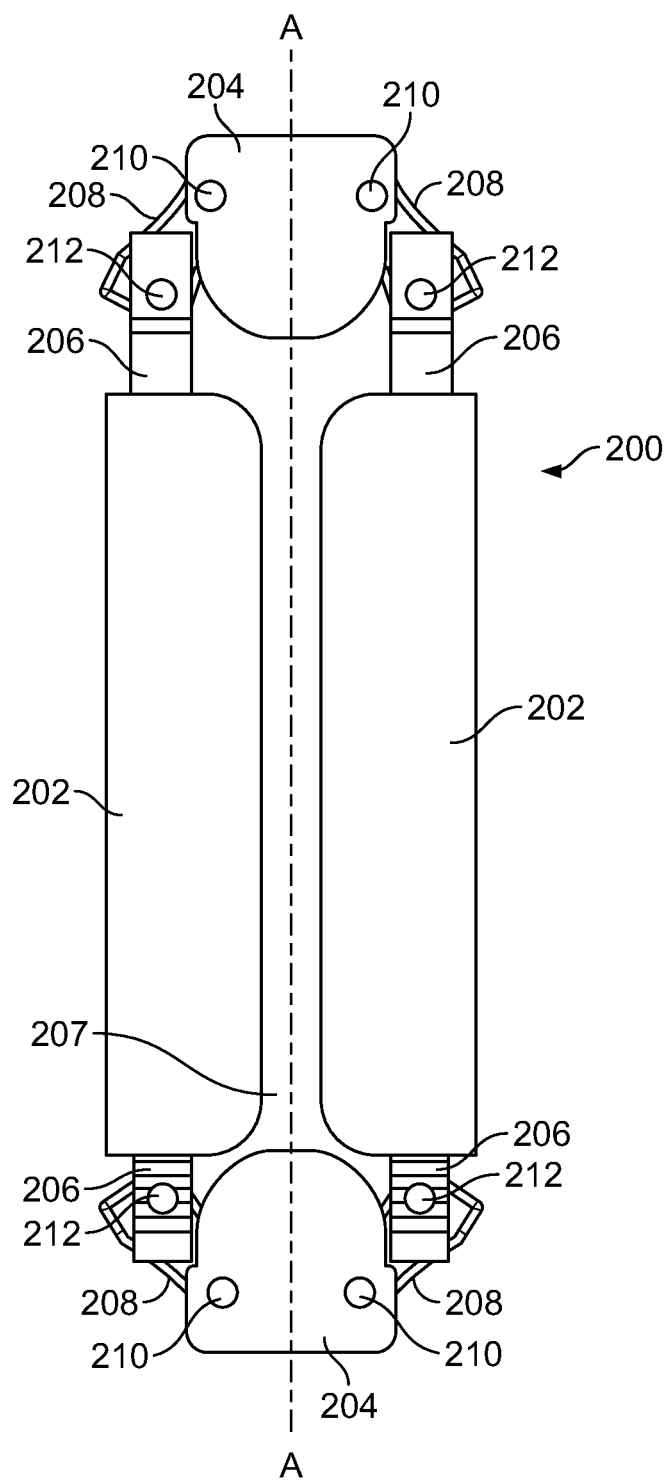


FIG. 40A

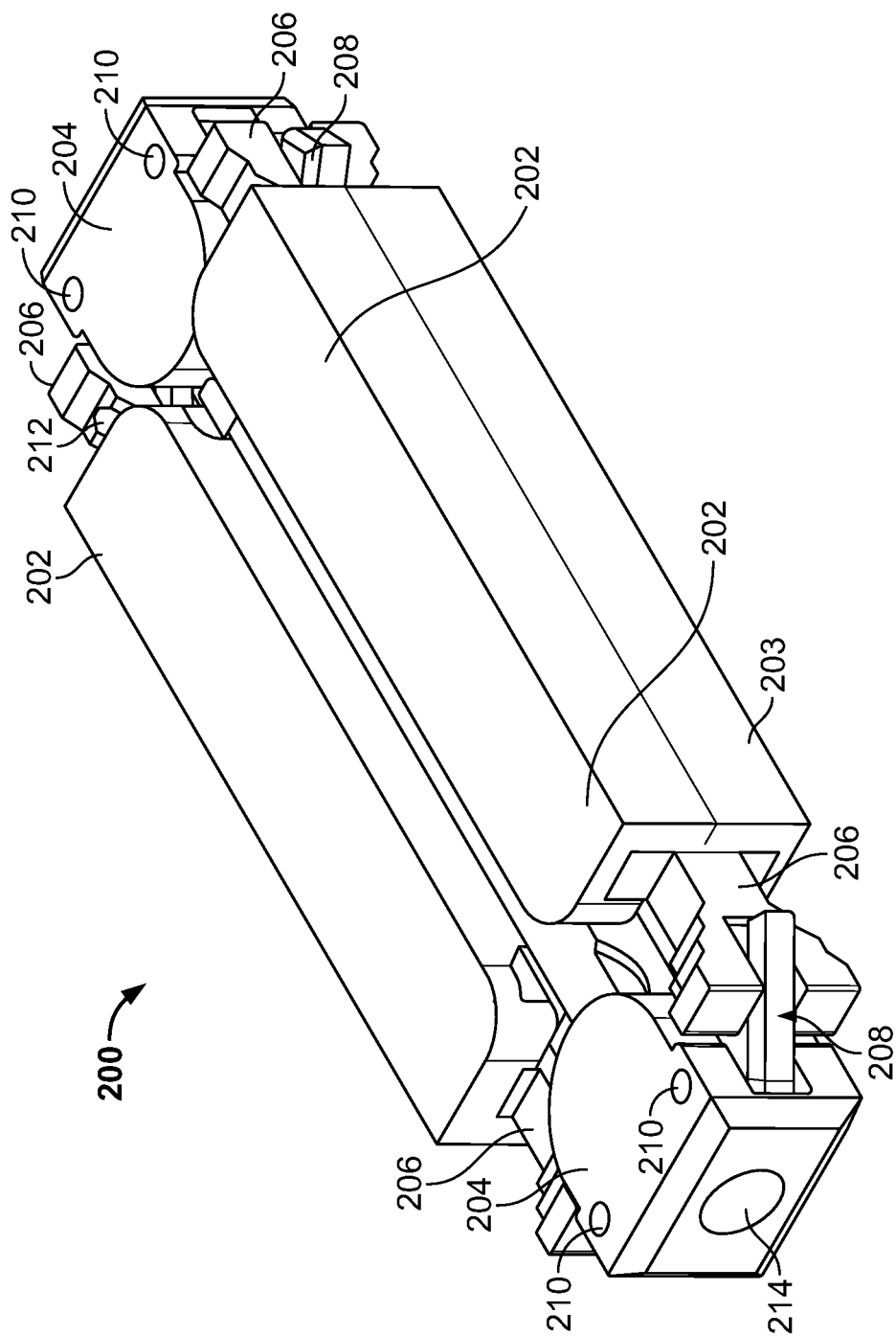


FIG. 40B

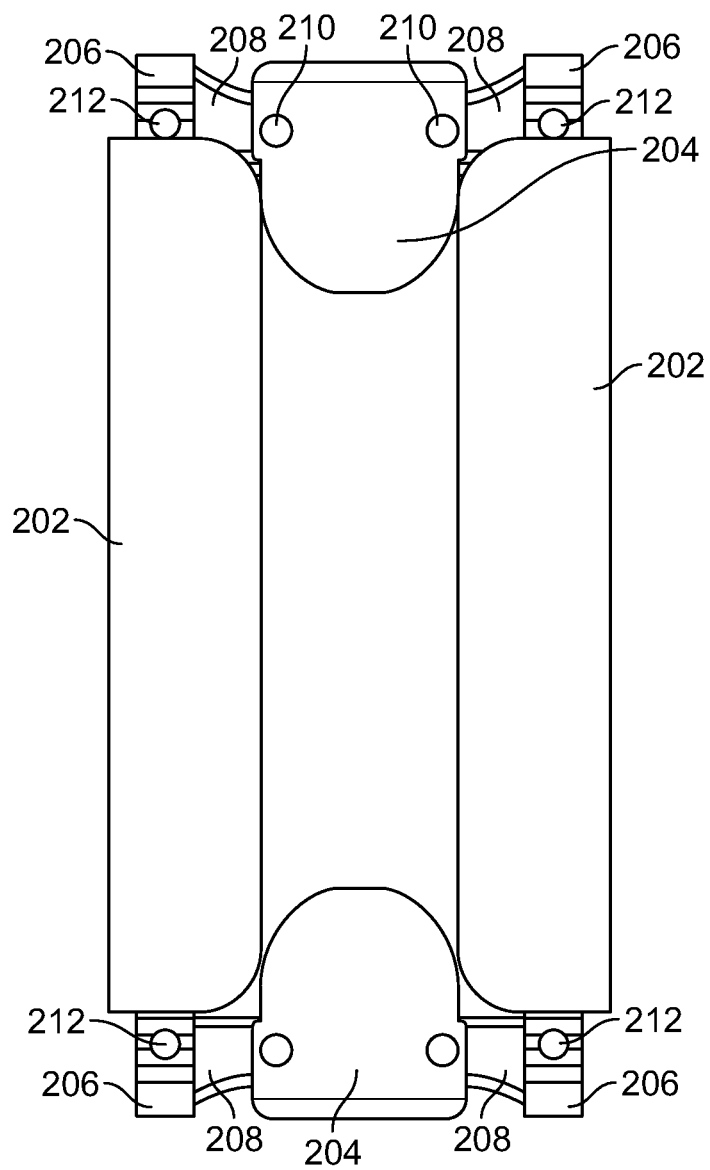


FIG. 41A

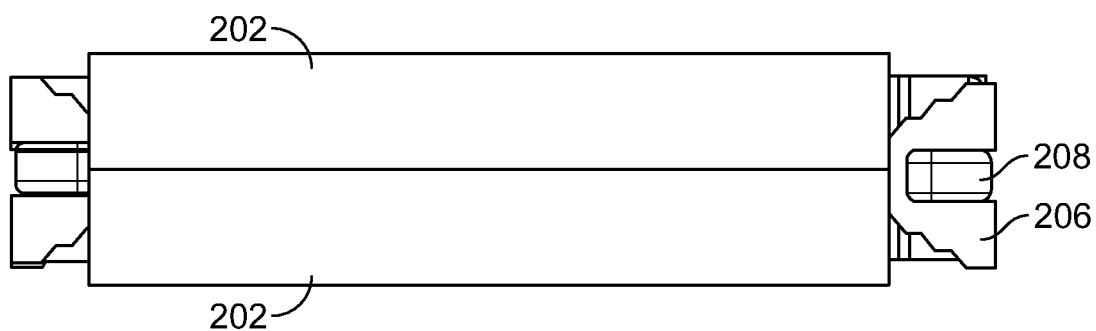


FIG. 41B

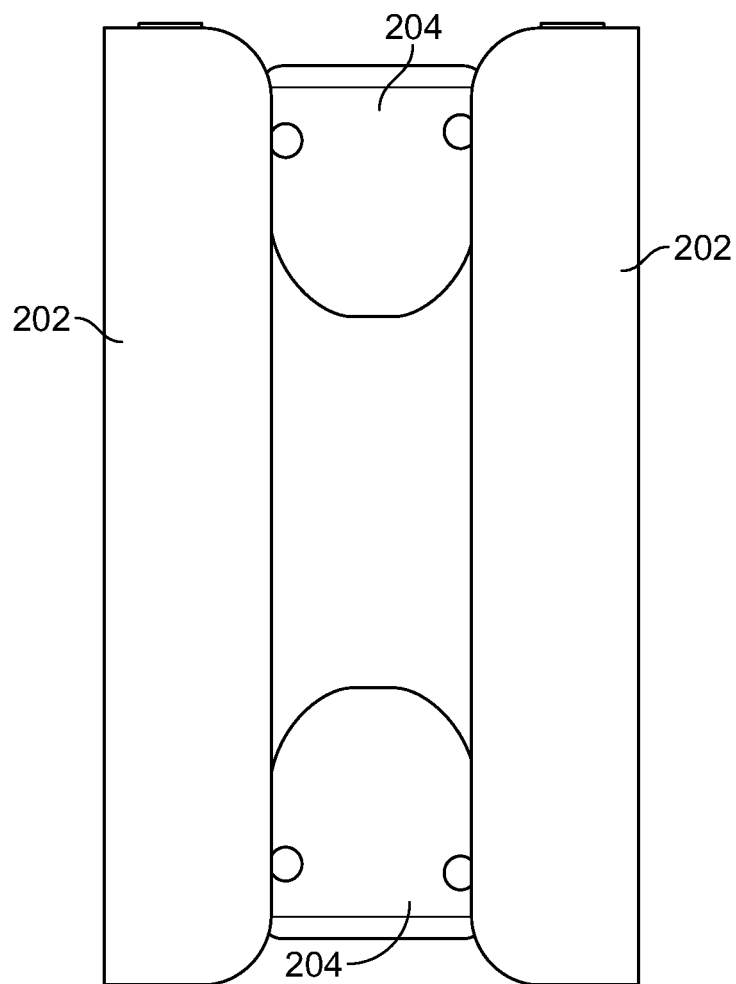


FIG. 42A

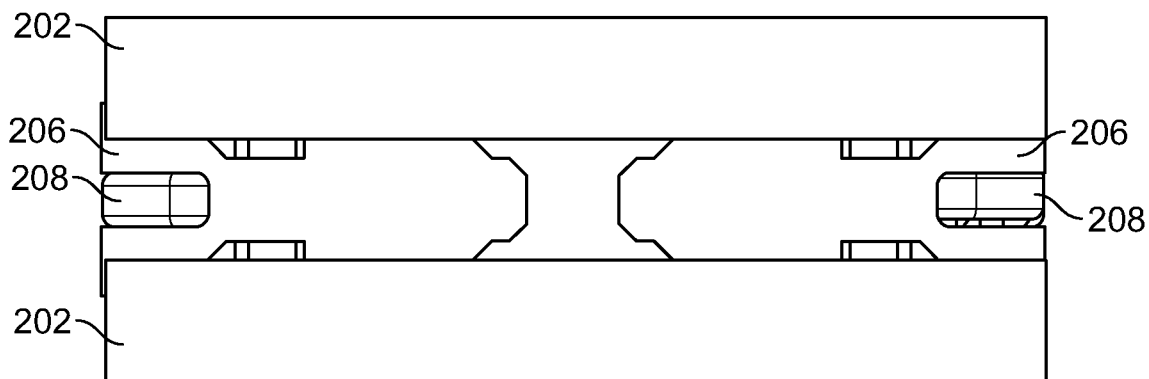


FIG. 42B



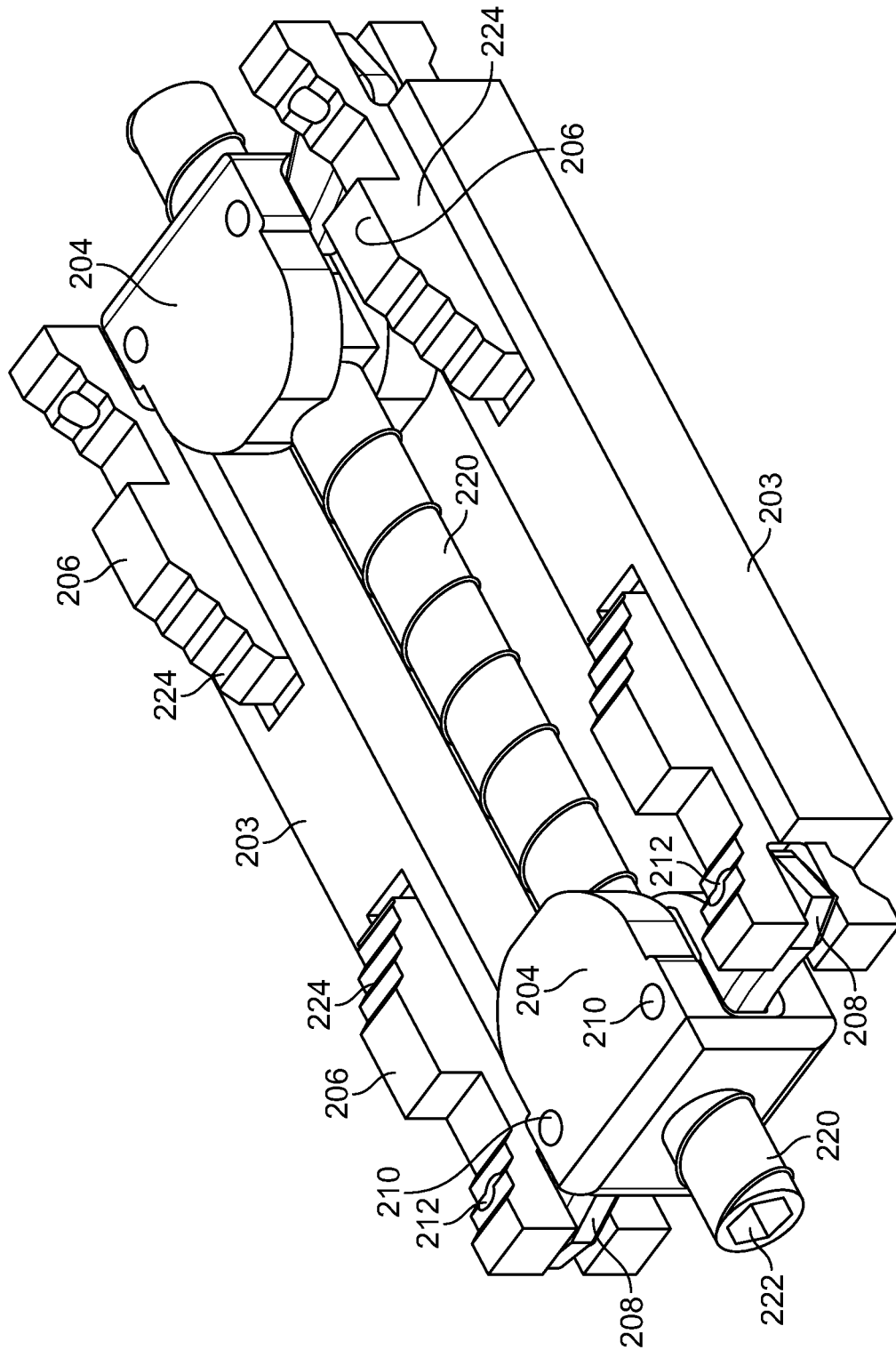


FIG. 43

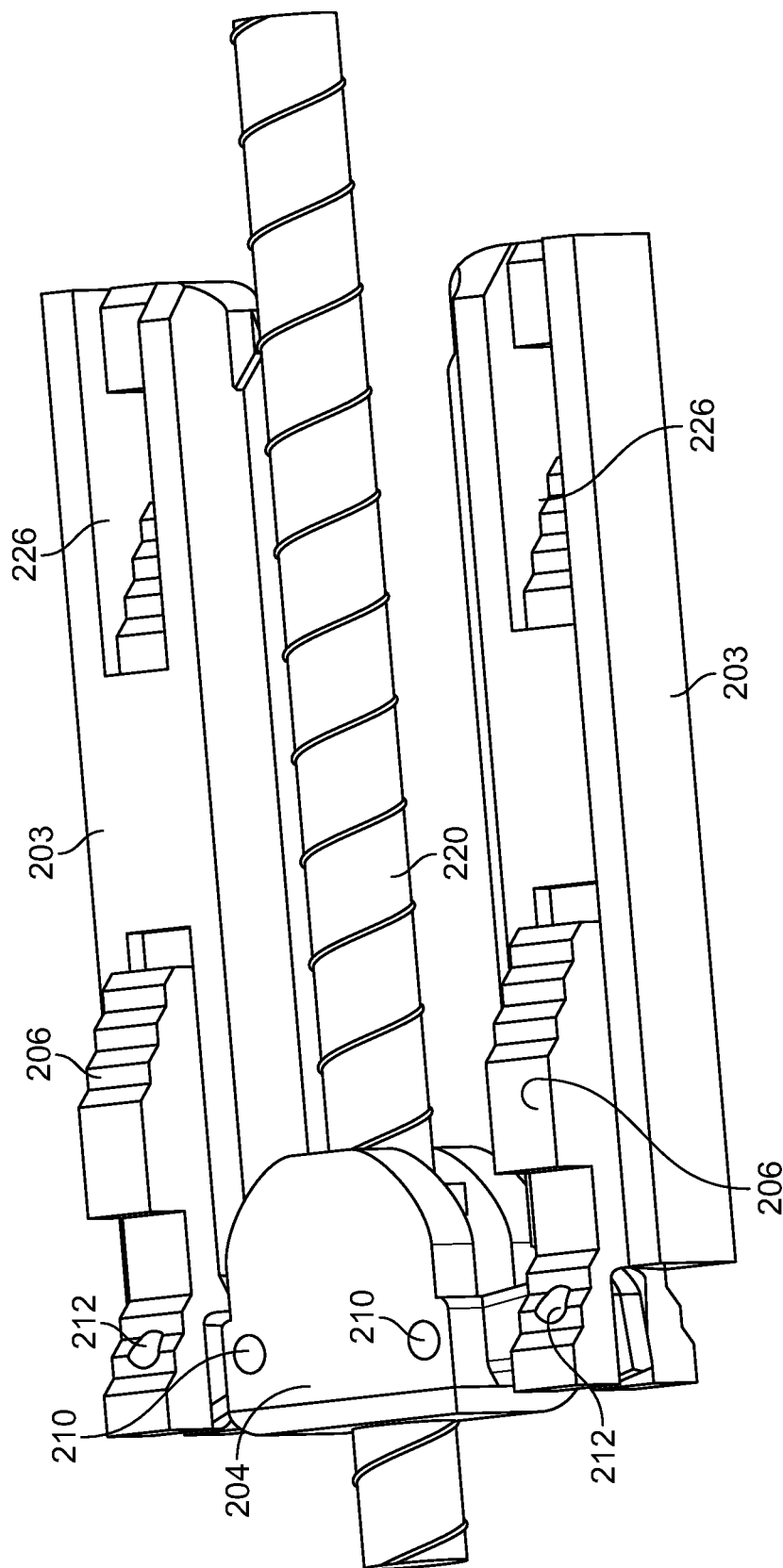


FIG. 44

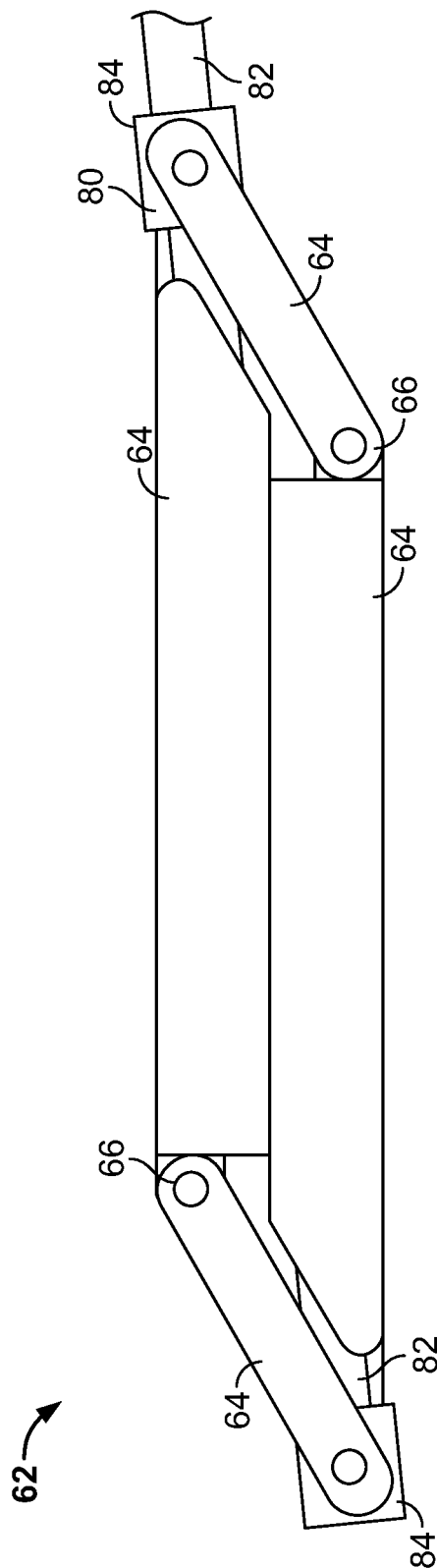


FIG. 45

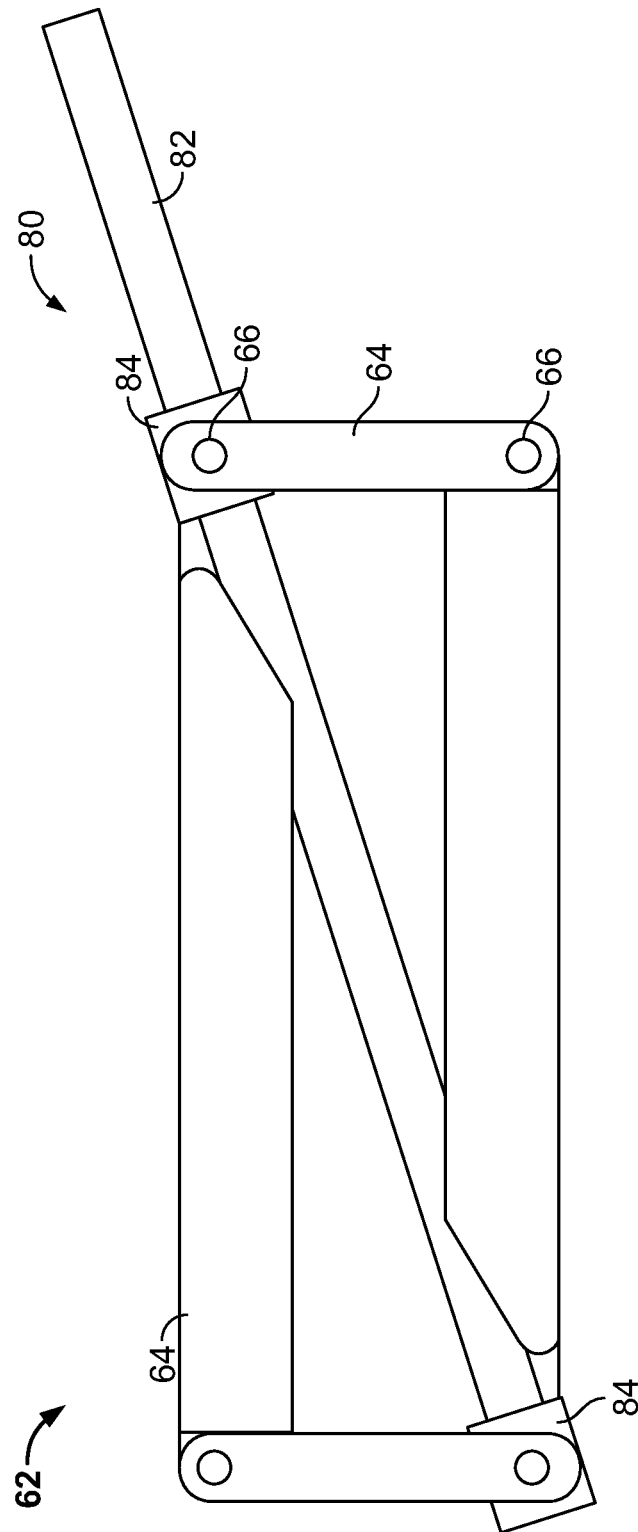
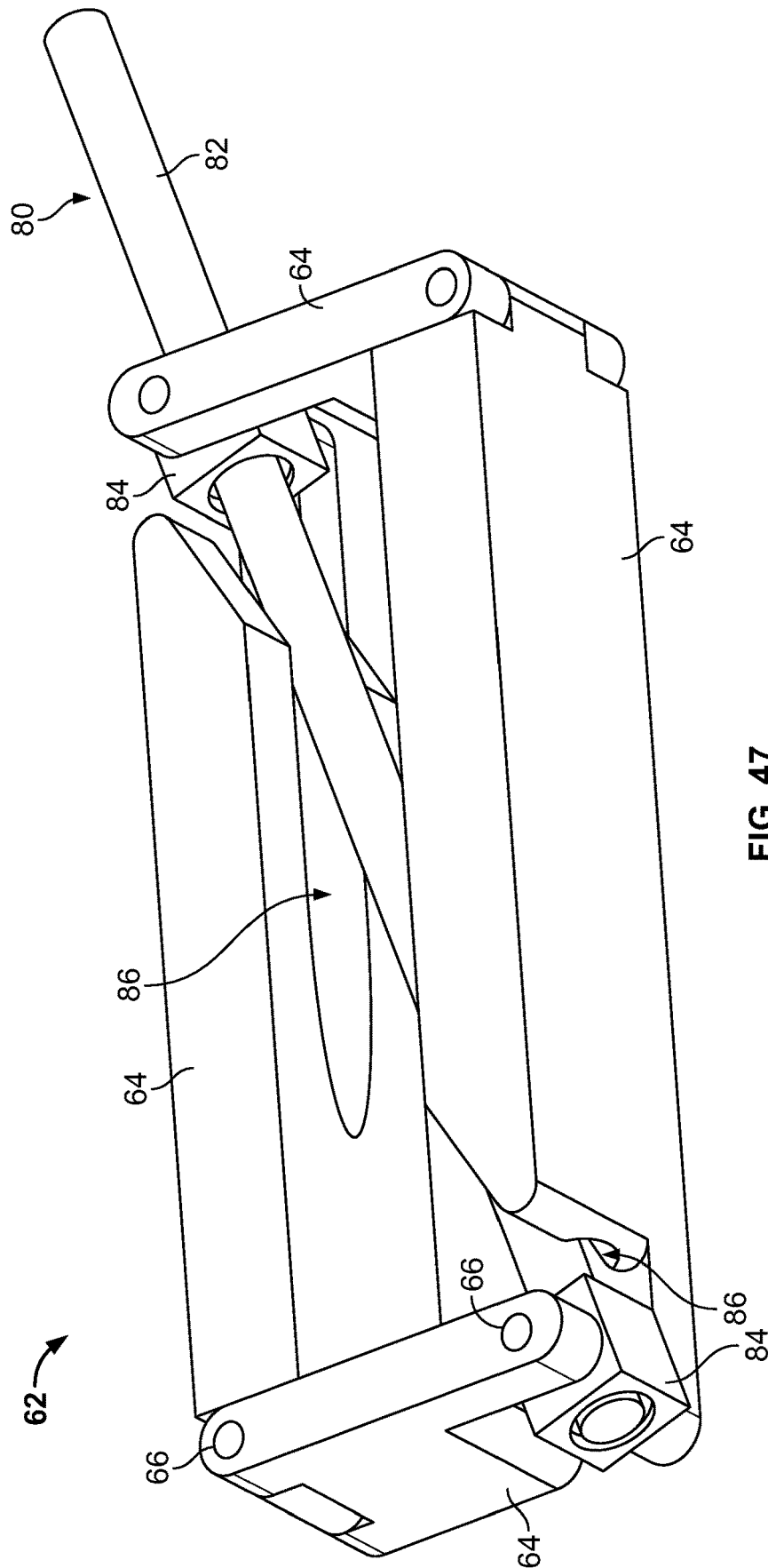


FIG. 46



**FIG. 47**

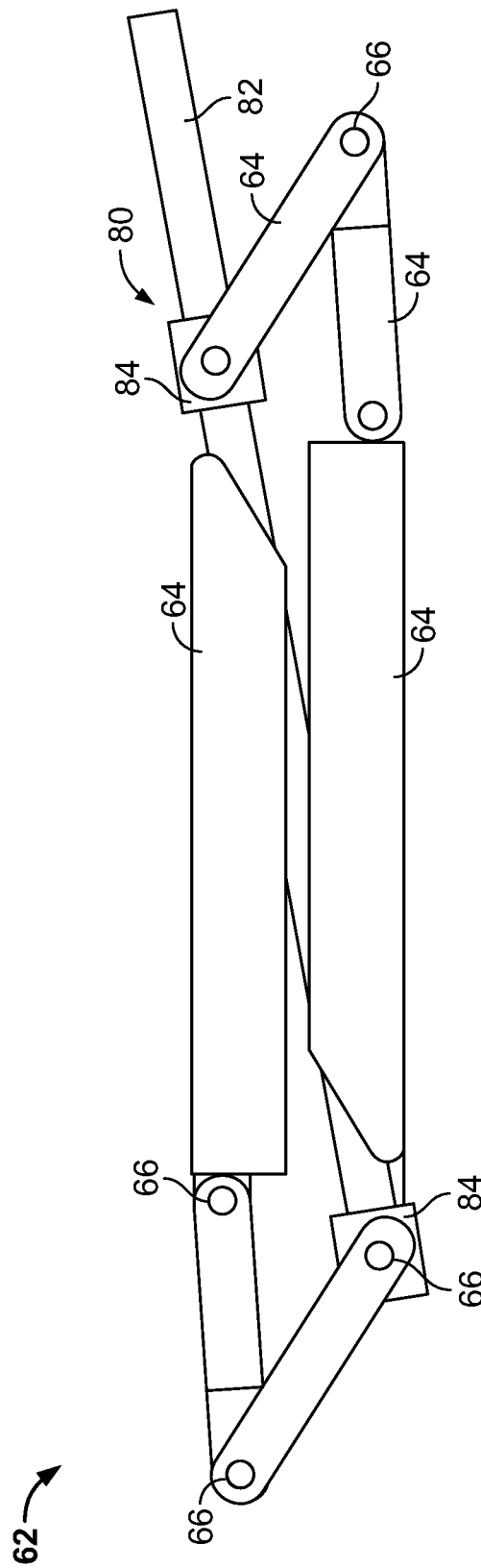
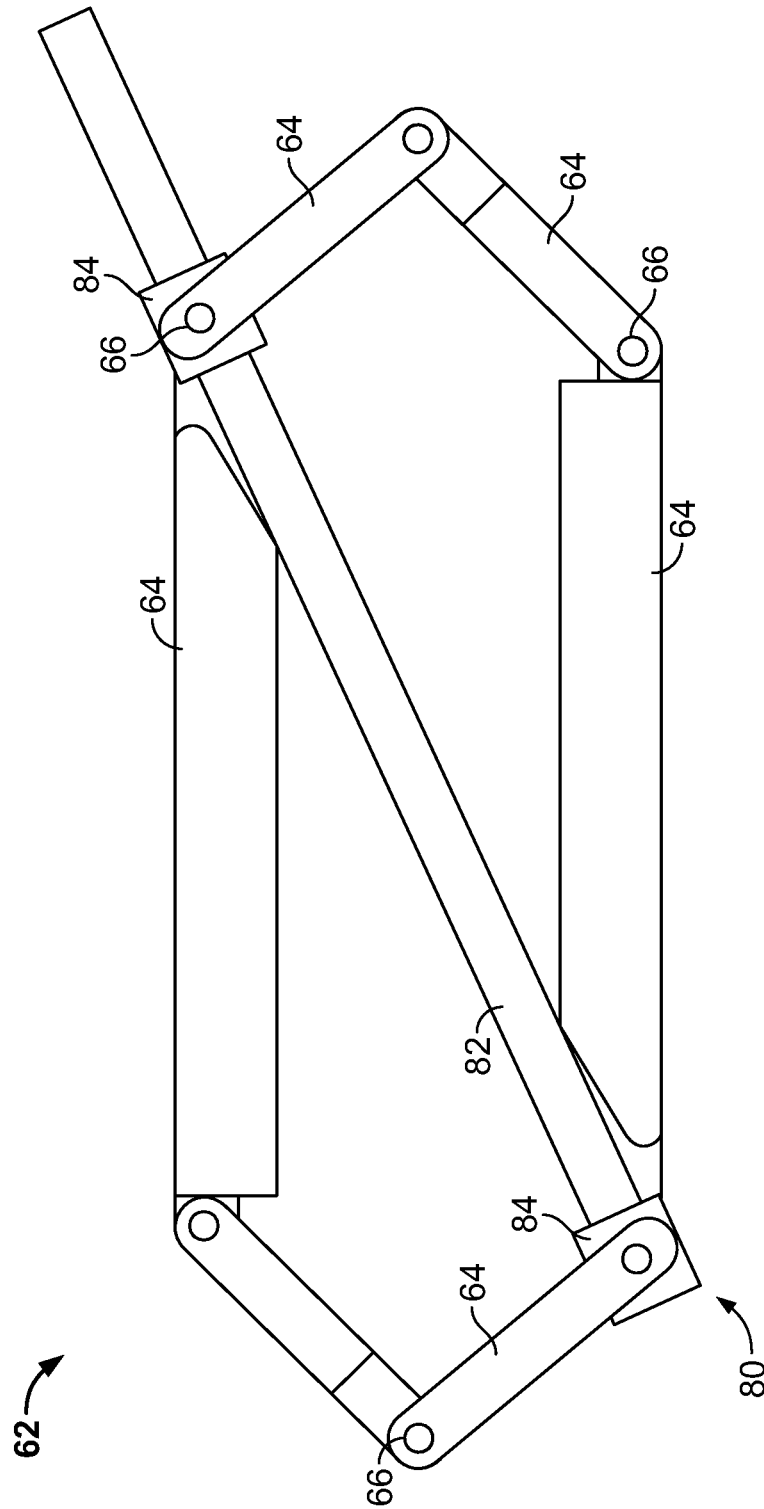


FIG. 48



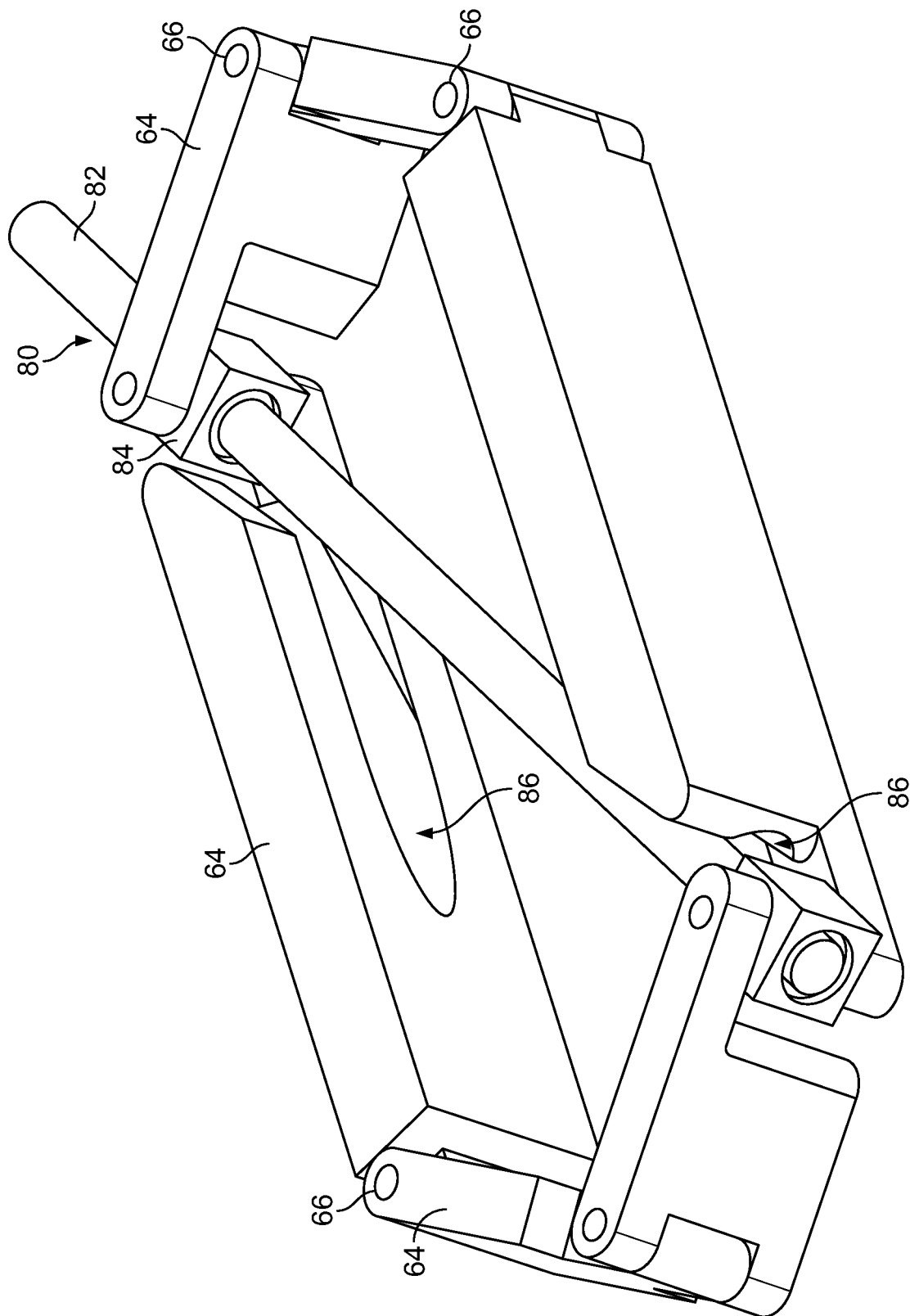


FIG. 50



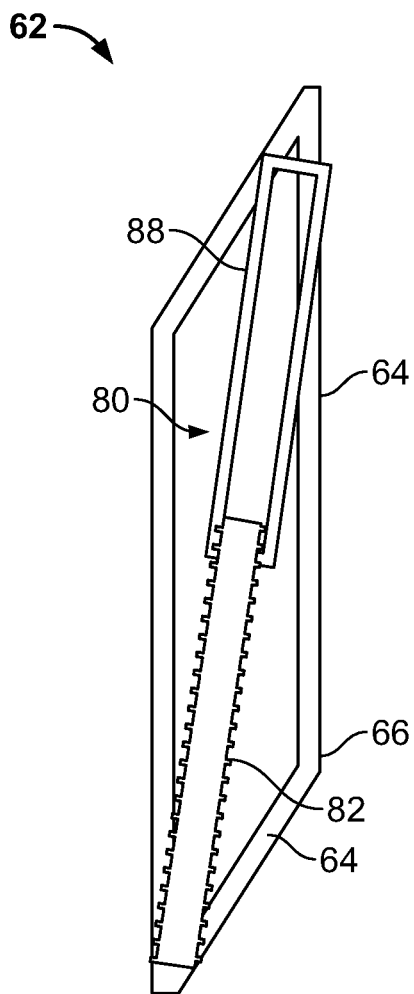


FIG. 51

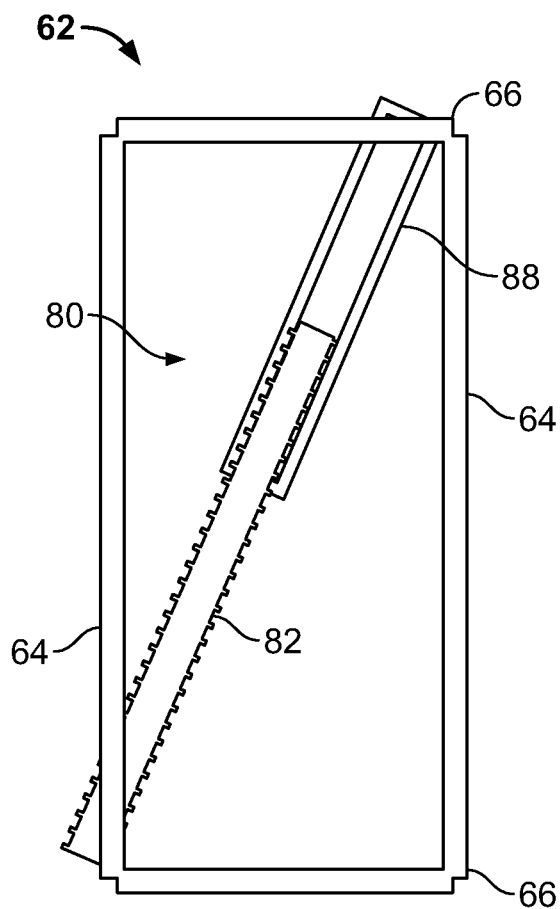


FIG. 52

**BONE FUSION SYSTEM****CROSS REFERENCE TO RELATED APPLICATIONS**

This application is a continuation of U.S. patent application Ser. No. 15/718,786, filed Sep. 28, 2017. U.S. patent application Ser. No. 15/718,786 is a continuation of U.S. patent application Ser. No. 14/347,442, filed Mar. 26, 2014, which is a 35 U.S.C. § 371 national phase entry of PCT Application No. PCT/US2012/058968, filed Oct. 5, 2012. PCT Application No. PCT/US2012/058968 claims the benefit of priority to U.S. Provisional Application No. 61/543,482, filed Oct. 5, 2011. Each of these applications are incorporated by reference in their entireties for all purposes.

**FIELD**

This invention relates to neurosurgical and orthopedic fixation systems and more particularly to bone fusions.

**BACKGROUND**

Spinal interbody fusion is frequently performed procedure to treat various disorders such as degenerated disk disease, spondylolisthesis, trauma, infection, tumor and deformity. Usually, surgery involves placement of screws into the vertebral body through the vertebral pedicle and/or placement of an interbody cage with bone grafts into the disc space. Types of spinal fusion depend on the approach type such as posterior, transforaminal, lateral, etc. Although these approaches claim to be minimally invasive, they still require open incisions for cage and screw placement. For example to perform one level interbody fusion the surgeon must perform an incision to perform discectomy and insert a cage, then four incisions to insert pedicle screws and then two more incisions to pass rods and stabilize screws to rods.

During spine stabilization operations a certain degree of compression or distraction is usually applied to stabilized vertebrae depending on the condition. Compression is usually performed on the concave side of the scoliotic deformity to correct it.

Distraction on the other hand is opposite to compression and is performed usually to decompress vulnerable structures that travel between vertebrae, i.e. nerve roots. Distraction is usually performed so as to increase the gap between vertebral bodies to decompress nerve roots escaping from neural foramina. It is also performed on the convex side of scoliotic deformity.

Improvements in fusion, compression and distraction methods and devices are therefore desired.

**SUMMARY**

Implementations of the present disclosure overcome the problems of the prior art by providing a bone screw including a threaded tip, a main shaft and a threaded outer sleeve. The main shaft has a proximal end and a distal end, wherein the distal end of the main shaft is connected to the threaded tip and extends proximally therefrom. The threaded outer sleeve has a proximal end and a distal end and defines an axial opening. The axial opening extends between the proximal and distal ends. The axial opening has a diameter that is greater than the proximal end of the main shaft so that the threaded outer sleeve can extend over and freely rotate about the proximal end of the main shaft.

The bone screw may include a stop member coupled to the main shaft proximal to the threaded tip. The stop member is configured to abut the threaded outer sleeve during rotation thereof to stop translation of the threaded sleeve relative to the threaded tip.

The proximal end of the main shaft may include a driver interface and a proximal end of the threaded outer sleeve may have a driver interface, allowing each to be driven by drivers with matching interfaces.

A fastener may be included in the bone screw, wherein the fastener is configured for attachment to the proximal end of the main shaft so as to lock the threaded outer sleeve between the fastener and the stop. For example, the fastener may be a nut and the proximal end of the shaft may include threads configured to mate with the nut.

The threaded outer sleeve may have threads with a different (larger or smaller) pitch than the threads of the threaded tip so as to have anti-rotation properties. Also, the threads may have an opposite orientation, right versus left-handed, for further anti-rotation properties.

The threaded tip may have an axial opening configured to allow its passage over a working wire. Also, the main shaft may have an axial opening to allow its passage over a working wire.

The screw may also include a cage having an outer diameter equal to a diameter of the threaded tip. The cage may be a cylinder defining a plurality of holes between a proximal end and a distal end. And, the distal end of the cage may include a locking surface configured to mate with a proximal surface of the threaded tip. The cage may be configured to slide over the stop member.

A method of relatively moving at least two of the bones may use the bone screw. For example, the method may include advancing a linearly arranged threaded distal tip and externally threaded proximal outer sleeve through a proximal one of the bones and into a distal one of the bones until the proximal outer sleeve extends at least partially within the proximal bone and the threaded distal tip extends at least partially within the distal bone.

The method includes rotating the proximal outer sleeve relative to the threaded distal tip so as to translate the proximal bone relative to the threaded distal tip and the distal bone.

For example, rotating the proximal outer sleeve in one direction translates the proximal bone away from the threaded distal tip and the distal bone. Rotating the proximal sleeve in the other direction translates the proximal bone toward the threaded distal tip and distal bone.

Rotation of the proximal outer sleeve relative to the threaded distal tip may be facilitated by holding the threaded distal tip while rotating the proximal outer sleeve. For example, holding the threaded distal tip may include engaging a proximal end of a main shaft connected to the distal tip.

Prior to rotating the threaded distal tip, a fastener may be removed from the proximal end of the main shaft. Also, a stop member coupled to the main shaft may be abutted by the proximal outer sleeve during rotation.

Also, a fastener may be attached, or reattached, to the main shaft after rotating the proximal outer sleeve. For example, a nut may be attached via threads onto threads of the distal end of the main shaft, thereby locking the outer sleeve against the stop or the threaded distal tip.

The method may also include advancing a cage positioned between the threaded distal tip and outer proximal sleeve, with the threaded distal tip and proximal sleeve until the cage is positioned in the disc space. Prior to advancing the cage, it may be filled with a bone graft or fusion material.

The bone or fusion material may communicate with bones through holes defined in the cage.

An intervertebral cage may be used to facilitate fusion between two vertebral endplates. The cage may include a plurality of links and a plurality of hinges. The links, such as four links, may be interconnected at adjacent portions by the hinges. The links preferably have a height configured to hold the vertebral endplates apart at a therapeutic distance.

Two of the links may have a first length and another two of the links a second, different length. The first length may extend within an anterior-posterior distance of the endplates and the second length may be configured to extend within a medial-lateral distance of the endplates.

A pin may be included to secure two adjacent links by sliding the pin into an opening defined by the adjacent links, thereby locking them into a predetermined angular position. One of the pin or the openings may include a locking mechanism configured to secure the pin within the opening. For example, the locking mechanism may include a detent in the pin or a spring loaded mechanism on the pin and/or links.

The predetermined angular position may be 90 degrees which, for four links, forms a square or a rectangle.

The links may define an opening in one side, the opening configured to receive a bone filling. Covering the opening may be a door and a hinge connected to the door.

The links may be configured to collapse into a relatively linear configuration with pairs of the links positioned adjacent each other.

A method of facilitating fusion of a pair of adjacent vertebral endplates may include inserting a linkage between the adjacent vertebral endplates through a small percutaneous opening. Also, two of the proximal links may be opened at the proximal hinge to form a proximal angle. Opening of the two proximal links simultaneously urges open two distal links of the linkage at a distal hinge to form a distal angle.

Opening may include forming equal proximal and distal angles. Opening may also include urging the distal links with ends of the proximal links through middle hinges separating the proximal and distal links. The proximal and distal angle may both be 90 degrees.

The cage may be locked into position by inserting a pin through the two proximal links.

One of the proximal links may be extended in a medial-lateral direction and the other one of the proximal links may be extended in the anterior-posterior direction.

A bone filling may be passed through an opening in one of the linkages to a position between the links of the linkage.

Before insertion, the linkage may be collapsed into a relatively linear configuration with pairs of the links positioned adjacent each other so as to fit through a relatively small surgical opening.

Another bone screw includes a proximal sleeve, an inner post, a distal screw portion and a stabilizer. The proximal sleeve defines an axial bore having a proximal end and a distal end. The proximal end of the axial bore includes a plurality of inner threads. The inner post has a head and a shaft. The shaft of the inner post extends through the axial bore of the proximal sleeve and the head is positioned within the proximal end of the axial bore. The distal screw portion is connected to the shaft of the inner post. The stabilizer has a plurality of threads and a driving feature. The stabilizer is configured to be advanced within the proximal end of the axial bore of the proximal sleeve along the threads until abutting the head of the inner post. Further advancement of the stabilizer distracts the distal screw and proximal sleeve.

The proximal sleeve may have a plurality of outer threads extending around an outer surface. The distal screw portion may also include a plurality of outer threads extending around an outer surface.

The distal screw portion may have an inner bore wherein the shaft of the inner post is press fit within the inner bore.

The proximal sleeve includes at least one non-cylindrical outer surface configured to mate with a driver. This surface, for example, may be part of a hexagonal cross-section.

The head of the inner post may define a driving receptacle, such as a hexagonal cross-section. The driving feature of the stabilizer may be a non-cylindrical through-bore, wherein the non-cylindrical through bore and driving receptacle are configured for alignment for simultaneous driving of the inner post and the stabilizer.

The distal screw portion may include a proximal end and a distal end. The proximal end of the may have an ingrowth surface configured to facilitate bone ingrowth. The ingrowth surface, for example, may have a textured pattern, such as a knurled pattern. The textured pattern may be configured to hold bone growth promoting compounds, such as bone chips. The distal end of the distal screw may have a tapered shape bearing the plurality of outer threads. Also, the distal end of the distal screw portion may have a distal-most point.

The bone screw may include a connector which includes the stabilizer and a trap. The trap includes a pair of arms having inner threads. The proximal sleeve may include a proximal end and a distal end. The proximal end of the sleeve defines the proximal end of the axial bore. The distal end of the sleeve defines the distal end of the axial bore. Also, the proximal end of the sleeve may define a pair of U-shaped slots. The arms of the trap may be configured to fit within the U-shaped slots of the proximal end of the proximal sleeve. The threads of the stabilizer are configured to advance along both the inner threads of the pair of arms and the proximal end of the axial bore to distract the distal screw and proximal sleeve.

The trap may further include a base and a cap. The arms extend away from the base and the cap is configured to fit between the free ends of the arms to retain the stabilizer therein.

A method of relatively moving at least two bones includes advancing a distal screw portion into one of the bones. A proximal sleeve is advanced into another one of the bones. And, the method includes advancing a stabilizer within an axial bore of the proximal sleeve against a head of an inner post mounted within the axial bore of the proximal sleeve. Further advancement of the stabilizer against the inner post moves the inner post within the axial bore of the proximal sleeve and moves the distal screw portion mounted to a distal end of the inner post away from the proximal sleeve.

Advancing the distal screw may include advancing a plurality of outer threads on the distal screw portion into the bone. Advancing the proximal sleeve includes advancing a plurality of outer threads on the proximal sleeve into the bone. Advancing the stabilizer may include rotating threads of the stabilizer along threads of the axial bore of the proximal sleeve.

The method may also include counter-rotating the stabilizer to distract the proximal sleeve away from the distal screw. Such counter-rotation causes the stabilizer to pull back on a trap connected to a proximal end of the inner post.

An intervertebral cage of another implementation includes two longitudinal bar pairs, at least one spacer and at least one separator for both lateral and vertical separation. The longitudinal bar pairs include an upper bar and a lower bar. The bar pairs are spaced from each other on opposite

sides of a midline vertical plane of the cage. The spacer is moveable within the space between the longitudinal bar pairs to cause movement of at least a portion of the longitudinal bar pairs away from each other and from the midline vertical plane. The separator is moveable between the upper and lower bar pairs of a bar pair to cause separation between at least a portion of the bars of that longitudinal bar pair.

These and other features and advantages of the implementations of the present disclosure will become more readily apparent to those skilled in the art upon consideration of the following detailed description and accompanying drawings, which describe both the preferred and alternative implementations of the present disclosure.

#### BRIEF DESCRIPTION OF THE DRAWINGS

FIG. 1 is a perspective view of a bone screw and drivers;  
FIG. 2 is a perspective view of an assembled bone screw from FIG. 1;

FIG. 3 is a perspective view of bilateral insertion of two needles and guide wires into two adjacent vertebrae and through a disc space;

FIG. 4 is a perspective view of a threaded distal tip of a bone screw and a cage and a main shaft sleeved over each of the guide wires of FIG. 3;

FIG. 5 is a perspective view of the bone screws of FIG. 4 with a threaded sleeve;

FIG. 6 is a perspective view of the bone screws of FIG. 5 with fasteners attached to their proximal ends;

FIG. 7 is an anti-rotation bone screw;

FIG. 8 is a plan view of a collapsed intervertebral cage configured for insertion through a small incision;

FIG. 9 is a plan view of the intervertebral cage of FIG. 8 expanded into a disc space and secured with a pin;

FIG. 10 is a plan view of an intervertebral cage with a door for accessing a central area of the cage;

FIG. 11 is a side elevation view of an intervertebral cage having a window;

FIG. 12 is a schematic of a threaded distal tip and a main shaft of a bone screw;

FIG. 13 is a schematic of a threaded outer sleeve;

FIG. 14 is a schematic of a fastener;

FIG. 15 is a schematic of drilling a pilot hole into two bones;

FIG. 16 is a schematic of reaming or tapping of the two bones of FIG. 15;

FIG. 17 is a schematic of the two bones of FIG. 16 after tapping is completed;

FIG. 18 is a schematic of driving of a bone screw into the tapped hole of FIG. 17;

FIG. 19 is a schematic of distracting the two bones of FIG. 18 apart by rotating an outer sleeve of the bone screw;

FIG. 20 is a schematic of attaching a fastener to the bone screw of FIG. 19 after distraction;

FIG. 21 is a schematic of compressing the two bones of FIG. 18 together by rotating an outer sleeve of the bone screw; and

FIG. 22 is a schematic of attaching a fastener to the bone screw of FIG. 21 for further compression;

FIG. 23 is a schematic of two bones attached with a plate and secured with two anti-rotation screws shown in FIG. 7;

FIG. 24 shows a perspective view of an expanded cage with four links and four hinges and defining a window subjacent a pin;

FIG. 25 shows a perspective view of a bone screw of another implementation;

FIG. 26 shows an elevation view of the bone screw of FIG. 25;

FIG. 27 shows a partial sectional view of the bone screw of FIG. 25;

FIG. 28 shows an enlarged section view of a proximal end of the bone screw of FIG. 25;

FIG. 29 shows a perspective view of a trap of the bone screw of FIG. 25;

FIG. 30 shows a plan view of a cap of a connector of the bone screw of FIG. 25;

FIG. 31 shows a plan view of a proximal sleeve of the bone screw of FIG. 25;

FIG. 32 shows an elevation view of the proximal sleeve of FIG. 31;

FIG. 33 shows a perspective view of a stabilizer of a connector of a bone screw of FIG. 25;

FIG. 34 is a plan view of the stabilizer of FIG. 33;

FIG. 35 is a perspective view of a distal screw portion of the bone screw of FIG. 25;

FIG. 36 is an elevation view of the distal screw portion of FIG. 35;

FIG. 37 is an elevation view of an inner post of the bone screw of FIG. 25;

FIG. 38 is an elevation view of an assembled connector and inner post of the bone screw of FIG. 25;

FIG. 39 is a perspective view of the assembly of FIG. 38;

FIG. 40A is a plan view of a laterally and vertically expandable cage;

FIG. 40B is a perspective view of the expandable cage of FIG. 40A;

FIG. 41A is a plan view the expandable cage of FIG. 40A in a laterally expanded configuration;

FIG. 41B is a perspective view of the expandable cage of FIG. 41A;

FIG. 42A is a plan view of the expandable cage of FIG. 41A further vertically expanded;

FIG. 42B is a side elevation view of the expandable cage of FIG. 42A;

FIG. 43 is a partially disassembled view of the expandable cage of FIG. 42A;

FIG. 44 is a further disassembled view of the expandable cage of FIG. 43;

FIG. 45 is a plan view of a collapsed, four-bar intervertebral cage;

FIG. 46 is a plan view of the intervertebral cage of FIG. 45 in an expanded configuration;

FIG. 47 is a perspective view of the intervertebral cage of FIG. 46;

FIG. 48 is a plan view of a collapsed, six-bar intervertebral cage;

FIG. 49 is a plan view of the intervertebral cage of FIG. 48 in an expanded configuration;

FIG. 50 is a perspective view of the intervertebral cage of FIG. 49;

FIG. 51 is a schematic of another intervertebral cage in a collapsed configuration; and

FIG. 52 is a schematic of the intervertebral cage of FIG. 51 in an expanded configuration.

#### DETAILED DESCRIPTION OF THE INVENTION

Implementations of the present disclosure now will be described more fully hereinafter. Indeed, these implementations can be embodied in many different forms and should not be construed as limited to the implementations set forth herein; rather, these implementations are provided so that

this disclosure will satisfy applicable legal requirements. As used in the specification, and in the appended claims, the singular forms “a”, “an”, “the”, include plural referents unless the context clearly dictates otherwise. The term “comprising” and variations thereof as used herein is used synonymously with the term “including” and variations thereof and are open, non-limiting terms.

A method and system for performing bone fusion and/or securing one or more bones are disclosed. One or more screws of the system are configured to enable compression and distraction to modify the gap between the vertebral bodies. An intervertebral cage of the system is configured for lateral expansion from a nearly straight configuration to form a large footprint in the disc space.

Generally, for fusion, adjacent vertebrae are stabilized non-invasively without prior destabilization using bilateral screw placement and an expanding cage, both of which can be combined with the use of bone filling. Screws are passed from the inferior to superior vertebra, for example, through a trans-pedicular route so as to avoid neurological compromise. At the same time, the path of screw insertion is oriented to reach superior vertebra.

The cage of the system provides a structural component for forming a bony bridge, such as through the use of bone grafting materials, between the vertebrae. The cage is configured for minimally invasive insertion, such as through a small annulotomy and subsequent cage expansion. This provides a large surface area to prevent subsidence and facilitate fusion with reduced disc removal.

The systems and methods also provide the surgeon an ability to perform compression and/or distraction maneuvers during different neurosurgical and orthopedic procedures with a predictable amount of compression/distraction in terms of both distance and force. Although described in the context of vertebrae, it should be noted that none of the implementations described herein are limited to any particular anatomical bone structure. The bone screws, cages and other components described herein may be used on any number of bones or bone fragments, such as a tibia, skull, etc.

As shown in FIGS. 1-2, a bone screw 10 includes a threaded tip 12, a main shaft 14 and a threaded outer sleeve 16. The bone screw 10 may also include a cage 32 and a fastener 58.

As shown in FIGS. 1-2 and 12, the threaded tip 12 includes a proximal end 28 and a distal end 30. The proximal end 28 is configured for attachment of the main shaft 14, such as by having a threaded axial opening configured to receive a threaded end of the main shaft 14. The distal end 30 has a point that is configured for driving into bone, such as through an existing tapped or drilled hole in the bone, as will be shown below.

The proximal end 28 has a shape and diameter that generally matches an outer shape and diameter of the cylindrical cage 32 and/or a distal end 24 of the threaded outer sleeve 16. The proximal end 28 tapers to the point at the distal end 30. This can facilitate enlargement of the opening in the bone for subsequent passage of the remainder of the screw 10. The outer diameter of the proximal end 28, however, may also be larger than some internal diameter of the cylindrical cage 32, so that it does not slip distally off of the threaded tip 12.

As shown in FIGS. 1-2 and 12, the main shaft 14 includes a proximal end 18 and a distal end 20 and is attached to the threaded tip 12 and extends proximally therefrom. Such attachment can be by threaded insertion into the threaded tip 12, separate construction and later permanent attachment

(e.g., welding) or may be integrally formed with the threaded tip 12. The main shaft 14 has a diameter that is configured to fit through axial openings extending through the remaining components of the screw 10.

The main shaft 14 at its proximal end 18 has a threaded portion with a relatively high number of threads per inch. The proximal end 18 also defines a driver interface, such as a non-circular shaped receptacle or a non-cylindrical outer shape (e.g. square or hexagonal) that is configured to accept or slide into a driver for rotational advancement of the main shaft 14 with the threaded tip 12 at its distal end.

The main shaft 14 may also include a stop member 26 coupled thereto. The stop member 26, for example, may be an annular ring positioned about half way between the proximal end 18 and the distal end 20, as shown in FIG. 1. The stop member 26 may be separately attached or integrally formed with the main shaft 14. Other shapes are possible for the stop member 16, including shapes that match an outer shape and max diameter of the threaded outer sleeve 16 at its distal end 24 or a proximal end 34 of the cylindrical cage 32 so as to facilitate its passage through a bone opening. Generally, the stop member 26 is configured to act as a stop for distal travel of the threaded outer sleeve 16 over the main shaft 14 and therefore should have a larger diameter and/or incompatible shape with respect to an axial opening 26 of the threaded outer sleeve 16.

As shown in FIG. 1, the cage 32 includes the proximal end 34 and a distal end 36. The cage 32 has a shape (e.g., cylindrical) and outer diameter that is configured to trail the proximal end 28 of threaded tip 12 smoothly upon insertion. The cage 32 has defined axially, between the ends 34, 36, an opening that is configured to allow its passage over the main shaft 14 and possibly the stop member 26 to abut (by being somewhat smaller than a maximum diameter of) the proximal end 28 of the threaded tip 12. Other cage shapes are also possible, such as a square or non-cylindrical cross-section, wherein the shapes are configured to receive bone graft material or bone growth promoting materials such as bone morphogenic protein (BMP).

The cage defines lateral or side holes or openings 38 which allow bone growth promoters held within the cage to leak, diffuse or otherwise access (or be accessed by) adjacent bone structures so as to promote fusion. The lateral openings may be, for example, square openings when the cage 32 is formed of axially aligned rings connected by radially spaced longitudinals. The lateral openings 38 may also be other shapes and distributions, such as cylindrical openings or irregularly shaped and placed openings.

The distal end 36 of the cage 32 may include one or more locking surfaces configured to mate with a corresponding locking surface on the proximal end 28 of the threaded tip 12.

As shown in FIGS. 1-12 and 13, the threaded outer sleeve 16 has a proximal end 22 and the distal end 24. The axial opening 26 is defined axially through the threaded outer sleeve 16 and extends between the proximal and distal ends 22, 24 of the outer sleeve. The axial opening 26 has a diameter sufficient to receive and allow passage of the proximal end 18 of the main shaft 14. And, the threaded outer sleeve 16 is configured to extend over and allow the threaded outer sleeve 16 to freely rotate about the proximal end 18 of the main shaft 14.

The threaded outer sleeve 16 may have threads that match the threads of the threaded tip 12 and a maximum and minimum diameter that are the same as the diameters of the proximal end 28 of the threaded tip 12. The threaded outer sleeve 16 may also have a larger diameter (maximum or

minimum) than the diameter of the threaded tip 12 to facilitate rotational locking and/or secure fixation of the threaded outer sleeve 16.

As shown in FIGS. 1-2 and 14, the fastener 58 is a nut having a threaded inner opening and outer driving surfaces. The fastener 58 is configured for attachment to the proximal end of the main shaft 14 and engagement of the threads thereon to lock the threaded outer sleeve 16 against the stop member 26.

As shown in FIG. 4, the threaded tip 12 and the main shaft 14 may define a central wire opening for passage over a guide or working wire 40.

As shown in FIGS. 18 and 19, the system may also include an outer driver 42 and an inner driver 44. The inner driver 44 has a driving shaft 46 and a driving tip 48 that is configured to mate with the driving surfaces or opening on the proximal end 18 of the main shaft. At its proximal end (not shown) the inner driver 44 (and the outer driver 42) may have a grip or handle configured for hand driving and/or be configured to mate to a motorized driver.

The outer driver 42 includes a tubular shaft 50 and a driving tip 52. The tubular shaft 50 of the outer driver 42 is configured to sleeve over the proximal end 22 of the main shaft. The driving tip 52 is configured to mate with the driving surfaces of the proximal end 22 of the threaded outer sleeve 16 and/or with the driving surfaces of the fastener 58. In this manner, the outer driver 42 is configured to advance the fully assembled bone screw 10.

FIGS. 15-22 show use of the bone screw 10 to connect and/or compress or distract an inferior vertebra 54 and a superior vertebra 56. As shown in FIG. 15, a pilot hole is formed by use of a small drill bit which advances first through the inferior vertebra 54 and into the superior vertebra 56. As shown in FIGS. 16 and 17, the pilot hole is reamed with a remaining drill bit that is oversized relative to the small drill bit. The reamed hole approximates the diameter and thread pitch of the bone screw 10 components for easier insertion.

As shown in FIG. 18, the assembled screw 10, including threaded outer sleeve 16 sleeved over the main shaft 14 up to and abutting the stop member 26 and locked against the stop member 26 by the attached fastener nut 58, is advanced through the inferior vertebra 54 and the superior vertebra 56 using the inner driver 44. Notably, once the screw 10 is assembled and locked, the cylindrical threaded outer sleeve 16 is locked between the nut 58 and the stop member 26 on the main shaft 14 and is functioning as a regular screw.

As shown in FIG. 19, the fastener nut 58 has been removed (allowing the cylindrical threaded outer sleeve 16 to turn around the main shaft) and the outer driver 42 is engaged to the proximal end 22 of the threaded outer sleeve 16. While the inner driver 44 holds the main shaft 14 still, the outer driver 42 is rotated clockwise against the stop member 26 to distract the inferior vertebra 54 away from the superior vertebra 56.

As shown in FIG. 20, once the desired distraction distance is accomplished, the fastener nut 58 is reattached to the proximal end 18 of the main shaft 14. This stops relative rotation of the sleeve 16 and the main shaft 14 and hence motion between the vertebrae 54, 56.

As shown in FIG. 21, the vertebrae 54, 56 (or other bones as the case may be) can be compressed relative to each other. The inner driver 44 holds the main shaft 14 still and the outer driver 42 is rotated counter-clockwise away from the stop member 25. Then, as shown in FIG. 22, the fastener nut 58 is attached to the proximal end 18 of the main shaft and as it is advanced thereon, the cylindrical outer sleeve 16 is

advanced toward the stop member 26 and the vertebrae 54, 56 are compressed toward each other.

As shown in FIG. 3, several screws 10 may be deployed to bridge two vertebrae 54, 46 across the disc space at an angle using a posterior approach or a bilateral, transpedicular approach. As shown in FIG. 3, the driving direction is an inferior to superior trajectory starting with two small 1 cm incisions in the lumbar regions. A JAMSHIDI needle is inserted through each of the incisions at the desired angle, the stylet removed and a K-wire inserted through the central opening of the needle. The needle is then removed.

As shown in FIG. 4, the threaded tip 12, the main shaft 14 and the cylindrical cage 32 are advanced, using the inner driver 44, over the K-wire through the inferior vertebra 54, the disc space and into the superior vertebra 56. The cylindrical cage 32 may have been packed with a bone graft and/or fusion material that can communicate through holes in the cage. As shown in FIG. 5, the outer driver 42 is engaged on the threaded outer sleeve 16 and over the main shaft 14 to drive the threaded outer sleeve through the hole in the inferior vertebra 54.

As shown in FIG. 6, the locking nut 58 is attached to the main shaft 14 and the K-wire is withdrawn.

As shown in FIG. 7, the screw 10 may also include an oppositely threaded outer sleeve 16. The main shaft 14 includes no stop member 26 and has at its end attached the locking nut 58 to form a solid screw. Attachment of the threaded outer sleeve 16 is facilitated by its initial ability to freely rotate about the main shaft 14 once the threaded tip 12 and main shaft 14 are inserted into a bone. Then, reverse-threaded outer sleeve 16 can be counter rotated until it advances to the proximal end of the threaded tip 12. The locking nut 58 is then attached.

Because of the reverse threading of the threaded tip 12 and the outer sleeve 16, the screw 10 resists rotation when in a single structure, such as a single bone. Thus, as shown in FIG. 23, a plate 60 can be attached to bridge two bones with just two anti-rotation screws 10, one in each bone, eliminating rotational instability. Normally, two conventional screws are required in each bone to stop rotation of the plate relative to the bone. The anti-rotation screw 10 and the plate 60 may have structure for engaging each other, such as a corresponding non-cylindrical shape, to counter rotation of the plate and screw relative to each other.

As shown in FIG. 9, the system may use or include an intervertebral cage 62 that includes a plurality of links 64 and hinges 66, such as four links connected by hinges to form a four-bar linkage. Each of the links has a height configured to hold endplates of two adjacent vertebrae 54, 56 apart from each other a desired distance. Two of the links may have a first length and another two of the links may have a second length, not equal to the first length, so as to form a rectangular shape or equilateral shape.

Advantageously, the relatively thin dimensions of the links 64 and the flexibility of the hinges 66, allow the cage to be folded relatively flat upon itself, as shown in FIG. 8. This configuration allows the cage 62 to be inserted through a small incision into the disc space or between two adjacent bones. When deployed, the first length (and the two corresponding opposing links 64) extends anterior-posteriorly within the disc space between the end plates of the vertebra 54, 56. The second length extends medio-laterally within the disc space thereby providing a relative large footprint.

As shown in FIG. 9, the cage 62 may include a pin 68 that is configured to engage an opening in two adjacent ones of the links 64, across one of the hinges 66, so as to lock the adjacent links into a predetermined angular position, such as

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90 degrees. Defined in the pin **68** may be a detent that is engaged by one or both of the links **64** so that the pin **68** locks into position within the opening, wherein it can resist backing out from the opening. The pin **68** may also include a spring-biased rivet, ball or other engagement member configured to lock the relative sliding motion of the pin **68** once it has reached a predetermined position. The spring biased locking member may also be resident on one of the links and extend into the pin detent.

When deployed, the cage **62** has an open middle and may include a window **72** in one of the links **64** for providing access to the open middle, as shown in FIG. **11**. Also, a door **72** may be included, wherein the door is configured to open on its own hinge and provide access to the open middle, as shown in FIG. **10**. The door **70**, or the window **72**, may be used to access the open middle and place a “bone filling” such as a bone graft and/or growth promoting materials therein.

A method of using the cage **62** includes collapsing the links **64** into the linear arrangement, as shown in FIG. **8**, and inserting the linear arrangement through a small incision into the disc space. Then, the two proximal links **64** of the cage **62** are pried apart (such as by using long instruments) to form a proximal angle, such as a 90 degree angle.

Simultaneously, in the case of a four bar linkage, the opposite distal links **64** open at the opposite hinge to form a distal angle because the distal links **64** are urged open with ends of the proximal links through the middle hinges. Also in the case of a four bar linkage, the distal angle is equal to the proximal angle.

Once the cage **62** is expanded in the disc space, the pin **68** is inserted through the surgical opening through the opening in the proximal two links **64** until its detent or spring-loaded mechanism locks into place, as shown in FIG. **9**.

To facilitate fusion, the window **72** is accessed for insertion of a bone filling into the center opening of the cage **62**, as shown in FIGS. **10** and **11**. If the door **70** is present, it is opened, the bone filling is added, and the door is closed over the window **72**.

The window **72** may also be positioned, as shown in FIG. **24**, subjacent the opening for the pin **68**. The pin may include threads and extend through an opening above the window allowing for a more compact access for both the pin and the bone filling procedure. Further, tops and bottoms of the links **64** may have defined on them serrations or ridges to improve fixation.

Further advantageously, placement of the cage **62** may be combined with attachment of bilateral bone screws **10** (either before or after cage **62** placement) as described above for improved stability and fusion potential even through minimal incisions and relatively little disc removal.

An additional implementation of a bone screw **110** is shown in FIG. **25**. The bone screw **110** includes an inferior or proximal portion **112**, a superior or distal portion **114** and a connector **116**. The use of proximal and distal herein is relative to the healthcare worker or surgeon using the device. Inferior and superior are relative to the patient and assume the screw is being inserted through the vertebral bodies in a superior direction—towards the patient’s head. Of course, these directions are for reference.

As shown in FIGS. **27**, **31** and **32**, the proximal portion **112** has a sleeve shape (generally) and includes a proximal end **118** and a distal end **120**. The proximal end **118** includes a hexagonal outer diameter defining a transverse U-shaped slot **122** that extends through opposite walls of the hexagonal outer diameter. The hexagonal outer shape is configured to fit an 8 mm socket driver for advancement of the proximal

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portion **112**. The hexagonal outer diameter may have a diameter of 7.75 mm to 7.95 mm for example for mating with an 8 mm driver.

The U-shaped slot has a width of about 3.95 to 4.20 mm. Defined within the proximal end **118** is a cylindrical bore **124** having a plurality of threads extending around the inside diameter. The threads within the cylindrical bore **124** may have a pitch of about 1 mm, a major diameter of 6.80 to 7.00 mm and a minor diameter of 6.30 to 6.50 mm. The cylindrical bore **124** has a step change in diameter where the threads end near the bottom of the bore and a second step change to a smaller 5.31 mm. (Tolerances for the measurements herein are  $\pm 0.10$  mm for a two place decimal and  $\pm 0.05$  for a three place decimal.)

The distal end **120** of the proximal portion **112** includes a gradually tapering cylindrical shaft. For example, the taper may be 0.5 degrees. The distal end **120** may have a length of 25 mm and a plurality of threads extending around its outside surface. The threads may, for example, have a pitch of 2.5 mm, a major diameter of 7.35 mm and a minor diameter of 6.75 mm. As shown in FIG. **27**, the distal end **120** includes a cylindrical bore **126** that extends the length of the distal end **120** of the proximal portion **112**.

As shown in FIGS. **27**, **35** and **36**, the superior or distal portion **114** includes a screw portion **106** and an inner or main shaft or post **108**.

As shown in FIGS. **27** and **37-39**, the inner post **108** of the distal portion **114** includes a distal end **128** and a proximal end **130**. The distal end **128** of the inner post **108** includes a small diameter cylindrical section (e.g., 4.90 mm) with a chamfered free edge. For example, the chamfer may be 45 degrees. Defined within the distal end **128** of the inner post **108** is a 1.50 mm cylindrical bore. The distal end **128** of the inner post **108** may be 9.50 mm long and may include a bore **132**.

The proximal end **130** of the inner post **108** has a shaft portion **134** that has a cylindrical shape and extends along the middle of the inner post **108**. The proximal end **130** also includes a driving end **136** on its most proximal, free end, as shown in FIG. **29**. The driving end **136** has a head **138** which flares out to a diameter of  $6.19 \pm 0.10$  mm for example. The length of the head **138** may be 3 mm for example. The transition between the shaft portion **134** and the head **138** is defined by a convex taper, such as a taper with a 1.50 mm radius.

The driving end **136** may also include a driver receptacle **140**, such as the one shown in FIG. **28**, with a hexagonal shape configured to receive a driver, such as an Allen wrench or screw driver with a hexagonal driving end. Notably, other non-cylindrical shapes could be defined by the driver receptacle **140** to transmit torque from a driver.

The screw portion **106** includes a proximal end **142** and a distal end **144**. The proximal end is configured to facilitate bone ingrowth or other fixation of the bone screw **110** once implanted. For example, the proximal end **142**, as shown in FIG. **30**, may have a cylindrical shape with 20 mm length. The proximal end **142** may be a cage (as described above) for holding bone growth promoting compounds. Or, the proximal end **142** may have a knurled or textured outer surface that is configured to promote bone adhesion. The knurl for example may have a diamond shaped lattice that is configured to hold bone chips in the grooves of the knurl.

Defined within the proximal end **142** of the screw portion **106** may be a slightly tapering bore **150** having a proximal diameter of about 4.80 mm and tapering at 0.5 degrees along

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about a 10.00 to 10.40 mm length. This taper is configured for a press-fit reception of the inner post **108** which has a 4.90 mm diameter.

The distal end **144** of the screw portion has a conical shape that tapers gently at mid-shaft **146** and tapers aggressively near a point **148**. For example, the mid-shaft **146** may taper at 1 degree along about 12.5 mm and then at 25 degrees to the distal-most point. Threads extend along the distal end **144**, starting at its base and may have a pitch, for example, of 2.50 mm, a major diameter of 6.10 mm and a minor diameter of 5.40 mm.

As shown in FIGS. 27-30, 33, 34 and 38-39, the connector **116** includes a trap **152** and a locking nut or stabilizer **154**. Generally, the trap **152** is configured to couple to the remainder of the bone screw **110** and to contain the stabilizer **154**. The trap, as shown in FIG. 29, includes a base **156**, a pair of arms **158** and a cap **160**. The base **156**, for example, may have a circular ring shape defining a central bore or opening. The ring shape, for example, may have a radius of about 3.20 mm and the bore a diameter of 5.31 mm. The thickness or height of the base **158** may be about 1.50 mm. The bore may also include a 45 degree chamfer.

The arms **158** extend upwards (proximally) from the base **156** and are attached on opposite sides of the base **156**. The arms **158** have two angled flats defining their outer surfaces and partial cylindrical arcs defining their inner surfaces, the cylindrical arcs tracing a radius of 3.50 mm of a circle. At their proximal-most free edge is defined a lip **162** which is a step down to a slightly bigger radius (3.60 mm) partial cylindrical surface. The arms have a length of about 11 mm, or 9.50 mm more than the height of the base **156**. The arms also have a width of about 3.85 mm or 3.95 mm.

Defined near the proximal or top ends of the arms **158** are a pair of aligned, concentric pin holes **164**. The pin holes **164** have a radius of about 0.75 mm. The pin holes **164** are centered at the apex between the two outer angled flat surfaces of the arms **158**.

As shown in FIGS. 28 and 30, the cap **160** may include a cylindrical ring **168** with a pair of enlarged ears **166**. The radius of the ring **168** of the cap **160** may, for example, be about 3.15 mm. The ears **166** are portions of an outer, larger cylinder and extend from opposite sides of the ring **168**. Defined through the ears **166** are a pair of pin holes **164** that are axially aligned with each other on opposite sides of the axis of the cap **160**. The radius of the ears **166** is configured to match the radius of the inner opening of the arms **158** proximal the lip **162**. For example, the ears may have a 3.60 mm radius. The matched radius allows the cap to be seated on the lip **162**.

As shown in FIGS. 33-34, the stabilizer **154** has a cylindrical shape with a plurality of threads extending around its out surface. The threads, for example, have a pitch of 1 mm, a major diameter of 6.60 mm to 6.79 mm and a minor diameter of 6.10 mm to 6.29 mm. The length or height of the cylinder is about 3 mm. Defined in the center of the stabilizer is a driver receptacle **170**, such as a  $\frac{5}{32}$  hexagonal receptacle for an Allen wrench. Driving of the stabilizer, as will be described in more detail below, drives compression and distraction of the proximal portion **112** and distal portion **114** of the bone screw **110**.

As shown in FIGS. 38-39, the trap **152** and stabilizer **154** may be first assembled to the head **138** of the inner post **108**. For example, the distal end **128** of the inner post **108** may be slipped through the opening in the base **156** of the trap until the head **138** is positioned between the arms **158**. (The head **138** is too large to pass through the base **156** ring.) The stabilizer **154** may then be advanced, such as by an Allen

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wrench, along the threads within the arms **158** until it abuts the head **138**. Then, the cap **160** may be slipped in between the upright arms **158** of the trap **152** until the ears **166** hit the lip **162**. The pin holes **164** of the cap **160** and arms **158** are aligned. Optionally, a pin may be advanced through the pin holes **164**. The pin allows for deformation in the inner post during the pressure fitting. This connection between the inner post and the superior screw may also be connected together by a rivet or other fasteners.

As shown in FIG. 27, the inner post **108** and connector **116** may then be assembled by insertion through the proximal portion **110** of the bone screw **110**. In particular, the distal end **128** of the inner post **108** may be inserted through the cylindrical bores **124**, **126** of the proximal portion **112** of the bone screw **110**. As the inner post **108** is advanced, the arms **158** of the trap **152** are aligned with and inserted into the U-shaped slots **122** of the proximal end **118**. Further advancement may include rotating or driving the stabilizer **154** so that its threads advance along the inner threads on the inside of the proximal end **118**.

The distal end **128** of the inner post **108** is then press fit into the bore **150** of the proximal end **142** of the screw portion **106**. Rather than a press fit, other attachments could be employed such as threaded fittings, clamps, adhesives, etc. Once this assembly is finished, the bone screw **110** is ready for use in attaching, contracting or distracting vertebrae as described, for example, in the procedures disclosed for the bone screw **10** above.

The entire bone screw **110** may be driven by way of the hexagonal shape of the proximal end **118** of the proximal portion **112** of the bone screw.

After driving into two bone pieces, such as two adjacent vertebra or bone fragments, the relative positioning of the proximal portion **112** and distal portion **114** of the bone screw **110** (and hence of the adjacent bone fragments) may be controlled by insertion of a driver through the opening in the cap **160**, the driver receptacle **170** of the stabilizer **154** and into the driver receptacle **140** of the inner post **108**. Rotating the driver causes the threads on the stabilizer **154** to advance (or retract if counter-rotating) along the threads of the proximal portion **112**. This causes the proximal portion **112** to slide along the inner post **108** of the distal portion **114**.

Counter rotation of the stabilizer **154** distracts the proximal and distal portions because the stabilizer backs into the cap **160** of the trap **152**. This pulls on the arms **158** and base **156** of the trap which is nested around the head **138** of the inner post **108**. As the connector assembly moves out of the proximal portion **112**, the screw portion **106** on the opposite end of the inner post **108** is pulled closer to the proximal portion.

FIGS. 40A and 40B illustrate an example expandable intervertebral cage in an unexpanded state. FIG. 40A is top view illustration of the example expandable intervertebral cage **200**. The cage is designed for implantation between two vertebrae of a patient at any location along the spine. For example, the cage can be implanted between two adjacent cervical, thoracic, lumbar, or sacral vertebrae. The cage is optionally used to fuse two adjacent vertebrae. The cage is optionally used to adjust the spacing between two adjacent vertebrae. The cage is optionally used with additional pharmacological, biological or mechanical agents administered at the site or in proximity to the site of implantation.

The cage **200** is optionally expandable both horizontally and vertically as will be described below. Optionally the cage is inserted between two adjacent vertebrae of the



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patient in a non-expanded state. An example of a horizontally expanded, but vertically non-expanded, state is shown in FIGS. 41A and 41B.

Once positioned as desired by a medical professional, the cage 200 can be expanded in a horizontal direction; for example, in the horizontal plane of the intervertebral space in which the cage is located. The cage 200 can also be optionally expanded in a vertical direction, which can increase the vertical separation between the adjacent vertebrae. Optionally, the horizontal expansion is performed before the vertical expansion. Optionally a single actuator is used to first cause horizontal expansion followed by vertical expansion. In this way, a low height and width profile of the unexpanded cage can be used for implantation and then with use of the single actuator, the height and width profile can be expanded as desired.

The cage 200 includes two pairs of longitudinal bars. Each pair includes an upper bar 202 and a lower bar 203 (as shown, for example, in FIG. 41B). The pairs are spaced from one another across the vertical midline plane A-A of the cage. The spacing across the vertical midline plane creates a space 207 that can be widened when the cage is expanded in the horizontal direction.

To cause movement of each bar pair away from the vertical midline plane, the cage includes at least one spacer 204. The one or more spacer 204 is moveable into and between the space 207 between the bar pairs. The size of the spacer 204 prior to horizontal expansion is larger than width of the space 207. To cause expansion, one or both of the spacers 204 are moved into the space 207, which urges the bars horizontally away from the midline plane A-A. Optionally, a surface of a spacer 204 is curved and corresponding surfaces of the bars are also curved. When the curved surfaces contact each other it facilitates entry of the spacer 204 into the space 207 and horizontal separation of the bar pairs.

As mentioned above, the cage 200 can also be expanded vertically. For example, the cage 200 optionally includes one or more separators 206. In the example cage 200 shown in FIGS. 40A-44, there are four separators.

Each separator 206 is positioned such that it can be moved between the bars (202 and 203) of the cage. In this regard, a first separator is positioned at a first end of one of the bar pairs for movement between that pair of bars, a second separator is positioned at a first end of the opposite bar pair for movement between that pair of bars, a third separator is positioned at a second end of one of the bar pairs for movement between that pair of bars, and a fourth separator is positioned at a second end of the opposite bar pair for movement between that pair of bars.

Each separator can be advanced between the individual bars at their given location. The separators have a height profile that is larger than any spacing between the upper 202 and lower bars 203 when the cage has not been vertically expanded. When one or more separator is advanced between the upper and lower bars, therefore, the bars are urged to separate, resulting in vertical expansion of the at least that bar pair.

Each separator 206 optionally has the same vertical or height profile so that when all four separators are advanced between the bars, the bar pairs symmetrically expand vertically. Optionally, however, one or more separator can have a different vertical or height profile from one or more of the other separators. The differing vertical or height profiles optionally result in an asymmetric vertical expansion of the cage when the separators are advanced between the bars. For example, a separator with a larger vertical dimension results

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in greater vertical displacement between the bars at the location where it is advanced between the bars, while a separator with a smaller vertical dimension results in a smaller vertical displacement between the bars at the location where it is advanced between the bars. Therefore, by selecting different sizes of separators in combination different asymmetric vertical expansion profiles are achieved. Similarly, the width profile of the spacers 204 may also differ. In this way, asymmetric horizontal expansion is optionally accomplished.

Each spacer 204 is optionally connected via two connectors 208 that are on the same end of the bars. A spacer 204 is connected via two pivot pins 210 to the connector, for example, allowing the spacer to pivot relative to each connector. The connectors are also pivotably connected to the separators 206 located on the same end of the bars.

A threaded rod 220 (shown, for example, in FIGS. 41A, 43 and 44) optionally connects with the two spacers 204. By actuating the threaded rod 220, for example by rotating it at point 222, the two spacers are moved towards each other between the bar pairs resulting in separation of the bar pairs away from the vertical midline plane. The spacers 204, for example, may be drawn to each other by having different direction threads within their respective openings.

As the spacers advance towards each other, the connectors pivot relative to the spacers 204 and to the separators 206. As shown in FIG. 40A, the midline of each connector is acutely angled relative to the vertical midline plane of the cage. As shown in FIG. 41A, as the spacers are advanced closer to one another and the bar pairs separate horizontally, eventually the connectors rotate to a more closely perpendicular orientation relative to the vertical midline axis.

During this movement of the spacers, from the position shown in FIG. 40A to the position shown in FIG. 41A, the separators remain substantially in the same position, due to the free pivoting of the connectors about the pivot points (210 and 212). Because there has been movement of the spacers towards each other but the separators have stayed substantially stationary, the cage undergoes horizontal expansion without substantial vertical expansion. A side view of the orientation of FIG. 41A, where horizontal expansion has occurred but vertical expansion has not occurred is shown in FIG. 41B.

As the spacers 204 are further advanced towards each other, the connector continues to pivot relative to the spacer and the separators and horizontal expansion progresses without substantial vertical expansion. Eventually the connectors cannot rotate any further as they contact one or more stop surfaces of the cage. For example, the stop surface is optionally a portion of the spacer and/or a surface of a bar that limits the ultimate extent of rotation. Once rotation has been stopped, continued actuation of the threaded rod 220 results in advancement of the separators 206 between the rods rather than further advancement of the spacers 204 towards each other. The result is that as the threaded rod is further actuated, the cage stops its horizontal expansion and begins a substantial vertical expansion as the separators 206 move between the rods to urge them apart vertically. In this way, the cage 200 is optionally expandable both horizontally and vertically. The horizontal expansion can occur prior to any substantial vertical expansion of the cage. FIG. 42B shows a side view after horizontal and vertical expansion.

As shown in FIG. 43, the separators 206 optionally have a sloped front surface with a lower vertical rise towards the front of each spacer and a higher vertical rise towards the back of each spacer. Optionally, as also shown in FIG. 43, the slope is stepped with each step being sequentially higher.

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In this regard, as a separator is advanced between the bars, vertical separation between the bars at that location of the separator increases until the portion of the separator having its maximal height dimension is positioned between the bars, or until a desired vertical separation between the bars is achieved. In addition, when the slope is stepped, the vertical separation between the bars at a location of the separator can be adjusted to progressively greater amounts by progressively advancing new steps between the bars.

Each bar, for example, as shown in FIGS. 43 and 44, optionally includes grooves 226 to accept the advancing separators 206. The grooves optionally include a complementary shape to the separator that is being advanced there into the groove.

Another implementation of the intervertebral cage 62 is shown in FIGS. 45-50 that include the use of a diagonally oriented draw bolt 80. FIGS. 45-47, for example, show a four-bar linkage (similar to the cage described above) that includes four links 64 interconnected by hinges 66. Two corners of the cage 62, however, are transfixed by the draw bolt 80 which includes a shaft 82 and a pair of nuts 84.

The shaft 82, for example, may be a threaded rod that is configured to extend through threaded openings in the nuts 84. The nuts 84 are positioned at the two diagonally opposing corners of the four-bar linkage. Each nut includes a pin 68 that extends into adjacent linkage ends that sandwich the nut between them. In this manner, the two adjacent links 64 can rotate relative to the nut 84. Each of the links also may include a scallop 86 or other adaptive space configured to allow the draw bar to achieve a collapsed position, such as is shown in FIGS. 45 and 46. The hinges 66 not transfixed are comprised of a pin 68 extending through a collinear opening in interdigitated portions of the adjacent ends of the links, as shown in FIG. 47.

A portion of the shaft 82 of the draw bolt 80 may have an extended length off of one hinge. This facilitates rotation of the shaft 82 after implantation of the cage 62 in the collapsed condition, such as is shown in FIG. 45. The two nuts 84 are drawn toward each other by rotation of the shaft 82 which may have different handed threads (or the nuts have different handed threads) to cause them to move toward each other with uni-directional rotation. Rotation of the shaft 82, therefore, may result in the expanded configuration shown in FIGS. 46 and 47.

Additional numbers of links 64 could be employed, such as 5, 6, 8 or additional links, although even link numbers have symmetrical expansion characteristics. FIGS. 48-50, for example, show use of six links 64 moving from a collapsed configuration (FIG. 48) to an expanded configuration (FIGS. 49-50) by way of rotation of the shaft 82 of the draw bolt 80.

FIGS. 51 and 52 show a variation wherein the draw bolt 80 includes a threaded shaft 82 which can reciprocate into and out of an internally threaded sleeve 88.

A number of aspects of the systems, devices and methods have been described. Nevertheless, it will be understood that various modifications may be made without departing from the spirit and scope of the disclosure. Accordingly, other aspects are within the scope of the following claims.

That which is claimed:

1. An intervertebral cage, comprising:

- a) a first longitudinal bar pair and a second longitudinal bar pair, each longitudinal bar pair comprising an upper bar and a lower bar, wherein a longitudinal bar pairs are spaced from each other on opposite sides of a midline vertical plane of the cage;

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- b) at least two spacers connected by a threaded rod and each moveable within the space between the longitudinal bar pairs to cause movement of at least a portion of the longitudinal bar pairs away from each other and from the midline vertical plane; and

- c) at least one separator movable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between at least a portion of the bars of that longitudinal bar pair.

2. The cage of claim 1, wherein movement of the at least two spacers within the space between the longitudinal bar pairs causes movement of the longitudinal bar pairs away from each other in a horizontal direction substantially perpendicular to the vertical plane of the cage.

3. The cage of claim 1, wherein movement of the separator between the upper and lower bars of the longitudinal bar pair causes vertical separation of the bars of that pair in a direction substantially parallel to the longitudinal plane of the cage.

4. The cage of claim 1, further comprising a plurality of separators, wherein each separator is moveable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between the bars of the longitudinal bar pair which it moves between, and wherein each separator has a height dimension that defines an extent of separation between the bars of a given longitudinal bar pair caused by the separator.

5. The cage of claim 1, further comprising a plurality of separators, wherein each separator is moveable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between the bars of the longitudinal bar pair which it moves between, wherein one or more bar separators have different height dimensions, and wherein movement of the plurality of separators having different height dimensions between the longitudinal bar pairs results in asymmetric vertical expansion of the cage.

6. The cage of claim 1, wherein in the threaded rod extends along the vertical midline plane of the cage, and actuation of the threaded rod causes movement of both spacers of the at least two spacers towards each other within the space between the longitudinal bar pairs.

7. The cage of claim 1, wherein:

- (a) the at least two spacers comprises a first spacer positioned in proximity to first ends of the longitudinal bars;
- (b) the at least one separator comprises a first separator positioned to be moved between the upper and lower bars of the first longitudinal bar pair to cause separation between at least a portion of the bars of said first longitudinal bar pair;
- (c) the at least one separator further comprises a second separator positioned to be moved between the upper and lower bars of the second longitudinal bar pair to cause separation between at least a portion of the bars of said second longitudinal bar pair, and wherein the cage further comprises;
- (d) a first connector pivotably connected to the first spacer and to the first separator; and
- (e) a second connector pivotably connected to the first spacer and to the second separator;
- (f) wherein movement of the first spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs; and
- (g) wherein movement of the first and second separators between the longitudinal bars of the first and second longitudinal bar pairs causes vertical separation between the longitudinal bars.

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8. The cage of claim 7, wherein movement of the first spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs prior to movement of the first and second separators between the longitudinal bars of the first and second longitudinal bar pairs, which causes vertical separation between the longitudinal bars.

9. The cage of claim 7, wherein:

- (a) the at least two spacers further comprises a second spacer positioned in proximity to second ends of the longitudinal bars;
- (b) the at least one separator further comprises a third separator positioned to be moved between the upper and lower bars of the first longitudinal bar pair to cause separation between at least a portion of the bars of said first longitudinal bar pair;
- (c) the at least one separator further comprises a fourth separator positioned to be moved between the upper and lower bars of the second longitudinal bar pair to cause separation between at least a portion of the bars of said second longitudinal bar pair, and wherein the cage further comprises;
- (d) a third connector pivotably connected to the second spacer and to the third separator; and
- (e) a fourth connector pivotably connected to the second spacer and the to the fourth separator;
- (f) wherein movement of the second spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs; and
- (g) wherein movement of the third and fourth separators between the longitudinal bars of the first and second longitudinal bar pairs causes vertical separation between the longitudinal bars.

10. The cage of claim 1, wherein the at least two spacers includes a cam surface configured to interact with surfaces of the longitudinal bar pairs.

11. The cage of claim 10, further comprising a connector pivotably connecting the at least two spacers with the at least one separator.

12. The cage of claim 1, wherein the at least one separator includes at least one sloped front surface configured to cause separation between the portion of the bars.

13. An intervertebral cage, comprising:

- a) a first longitudinal bar pair and a second longitudinal bar pair, each longitudinal bar pair comprising an upper bar and a lower bar, wherein the longitudinal bar pairs are spaced from each other on opposite sides of a midline vertical plane of the cage;
- b) at least one spacer moveable within the space between the longitudinal bar pairs to cause movement of at least a portion of the longitudinal bar pairs away from each other and from the midline vertical plane, wherein the at least one spacer comprises a first spacer positioned in proximity to first ends of the longitudinal bars; and
- c) at least one separator movable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between at least a portion of the bars of that longitudinal bar pair, wherein the at least one separator comprises a first separator positioned to be moved between the upper and lower bars of the first longitudinal bar pair to cause separation between at least a portion of the bars of said first longitudinal bar pair and a second separator positioned to be moved between the upper and lower bars of the second longitudinal bar pair to cause separation between at least a portion of the bars of said second longitudinal bar pair,

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(d) a first connector pivotably connected to the first spacer and to the first separator; and

(e) a second connector pivotably connected to the first spacer and to the second separator;

(f) wherein movement of the first spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs; and

(g) wherein movement of the first and second separators between the longitudinal bars of the first and second longitudinal bar pairs causes vertical separation between the longitudinal bars.

14. The cage of claim 13, wherein movement of the at least one spacer within the space between the longitudinal bar pairs causes movement of the longitudinal bar pairs away from each other in a horizontal direction substantially perpendicular to the vertical plane of the cage.

15. The cage of claim 13, wherein movement of the separator between the upper and lower bars of the longitudinal bar pair causes vertical separation of the bars of that pair in a direction substantially parallel to the longitudinal plane of the cage.

16. The cage of claim 13, further comprising a plurality of separators, wherein each separator is moveable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between the bars of the longitudinal bar pair which it moves between, and wherein each separator has a height dimension that defines an extent of separation between the bars of a given longitudinal bar pair caused by the separator.

17. The cage of claim 13, further comprising a plurality of separators, wherein each separator is moveable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between the bars of the longitudinal bar pair which it moves between, wherein one or more separators have different height dimensions, and wherein movement of the plurality of separators having different height dimensions between the longitudinal bar pairs results in asymmetric vertical expansion of the cage.

18. The cage of claim 13, further comprising two spacers each moveable within the space between the longitudinal bar pairs to cause movement of at least a portion of the longitudinal bar pairs away from each other and from the midline vertical plane, wherein the two spacers are connected by a threaded rod extending along the vertical midline plane of the cage, wherein actuation of the threaded rod causes movement of both spacers towards each other within the space between the longitudinal bar pairs.

19. The cage of claim 13, wherein movement of the first spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs prior to movement of the first and second separators between the longitudinal bars of the first and second longitudinal bar pairs, which causes vertical separation between the longitudinal bars.

20. The cage of claim 13, wherein:

(a) the at least one spacer further comprises a second spacer positioned in proximity to second ends of the longitudinal bars;

(b) the at least one separator further comprises a third separator positioned to be moved between the upper and lower bars of the first longitudinal bar pair to cause separation between at least a portion of the bars of said first longitudinal bar pair;

(c) the at least one separator further comprises a fourth separator positioned to be moved between the upper and lower bars of the second longitudinal bar pair to

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cause separation between at least a portion of the bars of said second longitudinal bar pair, and wherein the cage further comprises;

- (d) a third connector pivotably connected to the second spacer and to the third separator; and
- (e) a fourth connector pivotably connected to the second spacer and the to the fourth separator;
- (f) wherein movement of the second spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs; and
- (g) wherein movement of the third and fourth separators between the longitudinal bars of the first and second longitudinal bar pairs causes vertical separation between the longitudinal bars.

21. The cage of claim 20, further comprising a threaded rod, wherein the two spacers are connected by the threaded rod extending along the vertical midline plane of the cage, wherein actuation of the threaded rod causes movement of both spacers towards each other within the space between the longitudinal bar pairs.

22. The cage of claim 13, wherein the at least one spacer includes a cam surface configured to interact with surfaces of the longitudinal bar pairs.

23. The cage of claim 22, further comprising a connector pivotably connecting the at least one spacer with the at least one separator.

24. The cage of claim 13, wherein the at least one separator includes at least one sloped front surface configured to cause separation between the portion of the bars.

25. An intervertebral cage, comprising:

- a) a first longitudinal bar pair and a second longitudinal bar pair, each longitudinal bar pair comprising an upper bar and a lower bar, wherein the longitudinal bar pairs are spaced from each other on opposite sides of a midline vertical plane of the cage;
- b) at least one spacer moveable within the space between the longitudinal bar pairs to cause movement of at least a portion of the longitudinal bar pairs away from each other and from the midline vertical plane, wherein the at least one spacer includes a cam surface configured to interact with surfaces of the longitudinal bar pairs; and
- c) at least one separator movable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between at least a portion of the bars of that longitudinal bar pair.

26. The cage of claim 25, wherein movement of the at least one spacer within the space between the longitudinal bar pairs causes movement of the longitudinal bar pairs away from each other in a horizontal direction substantially perpendicular to the vertical plane of the cage.

27. The cage of claim 25, wherein movement of the separator between the upper and lower bars of the longitudinal bar pair causes vertical separation of the bars of that pair in a direction substantially parallel to a longitudinal plane of the cage.

28. The cage of claim 25, further comprising a plurality of separators, wherein each separator is moveable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between the bars of the longitudinal bar pair which it moves between, and wherein each separator has a height dimension that defines an extent of separation between the bars of a given longitudinal bar pair caused by the separator.

29. The cage of claim 25, further comprising a plurality of separators, wherein each separator is moveable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between the bars of the longitudinal bar

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pair which it moves between, wherein one or more bar separators have different height dimensions, and wherein movement of the plurality of separators having different height dimensions between the longitudinal bar pairs results in asymmetric vertical expansion of the cage.

30. The cage of claim 25, further comprising two spacers each moveable within the space between the longitudinal bar pairs to cause movement of at least a portion of the longitudinal bar pairs away from each other and from the midline vertical plane, wherein the two spacers are connected by a threaded rod extending along the vertical midline plane of the cage, wherein actuation of the threaded rod causes movement of both spacers towards each other within the space between the longitudinal bar pairs.

31. The cage of claim 25, wherein:

- (a) the at least one spacer comprises a first spacer positioned in proximity to first ends of the longitudinal bars;
- (b) the at least one separator comprises a first separator positioned to be moved between the upper and lower bars of the first longitudinal bar pair to cause separation between at least a portion of the bars of said first longitudinal bar pair;
- (c) the at least one separator further comprises a second separator positioned to be moved between the upper and lower bars of the second longitudinal bar pair to cause separation between at least a portion of the bars of said second longitudinal bar pair, and wherein the cage further comprises;
- (d) a first connector pivotably connected to the first spacer and to the first separator; and
- (e) a second connector pivotably connected to the first spacer and to the second separator;
- (f) wherein movement of the first spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs; and
- (g) wherein movement of the first and second separators between the longitudinal bars of the first and second longitudinal bar pairs causes vertical separation between the longitudinal bars.

32. The cage of claim 31, wherein movement of the first spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs prior to movement of the first and second separators between the longitudinal bars of the first and second longitudinal bar pairs, which causes vertical separation between the longitudinal bars.

33. The cage of claim 31, wherein:

- (a) the at least one spacer further comprises a second spacer positioned in proximity to second ends of the longitudinal bars;
- (b) the at least one separator further comprises a third separator positioned to be moved between the upper and lower bars of the first longitudinal bar pair to cause separation between at least a portion of the bars of said first longitudinal bar pair;
- (c) the at least one separator further comprises a fourth separator positioned to be moved between the upper and lower bars of the second longitudinal bar pair to cause separation between at least a portion of the bars of said second longitudinal bar pair, and wherein the cage further comprises;
- (d) a third connector pivotably connected to the second spacer and to the third separator; and
- (e) a fourth connector pivotably connected to the second spacer and the to the fourth separator;

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- (f) wherein movement of the second spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs; and
- (g) wherein movement of the third and fourth separators between the longitudinal bars of the first and second longitudinal bar pairs causes vertical separation between the longitudinal bars.

34. The cage of claim 33, further comprising a threaded rod, wherein the two spacers are connected by the threaded rod extending along the vertical midline plane of the cage, wherein actuation of the threaded rod causes movement of both spacers towards each other within the space between the longitudinal bar pairs.

35. The cage of claim 25, further comprising a connector pivotably connecting the at least one spacer with the at least one separator.

36. An intervertebral cage, comprising:

- a) a first longitudinal bar pair and a second longitudinal bar pair, each longitudinal bar pair comprising an upper bar and a lower bar, wherein the longitudinal bar pairs are spaced from each other on opposite sides of a midline vertical plane of the cage;
- b) at least one spacer moveable within the space between the longitudinal bar pairs to cause movement of at least a portion of the longitudinal bar pairs away from each other and from the midline vertical plane; and
- c) at least one separator moveable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between at least a portion of the bars of that longitudinal bar pair, wherein the at least one separator includes at least one sloped front surface configured to cause separation between the portion of the bars.

37. The cage of claim 36, wherein movement of the at least one spacer within the space between the longitudinal bar pairs causes movement of the longitudinal bar pairs away from each other in a horizontal direction substantially perpendicular to the vertical plane of the cage.

38. The cage of claim 36, wherein movement of the separator between the upper and lower bars of the longitudinal bar pair causes vertical separation of the bars of that pair in a direction substantially parallel to the longitudinal plane of the cage.

39. The cage of claim 36, further comprising a plurality of separators, wherein each separator is moveable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between the bars of the longitudinal bar pair which it moves between, and wherein each separator has a height dimension that defines an extent of separation between the bars of a given longitudinal bar pair caused by the separator.

40. The cage of claim 36, further comprising a plurality of separators, wherein each separator is moveable between the upper and lower bars of one of the longitudinal bar pairs to cause separation between the bars of the longitudinal bar pair which it moves between, wherein one or more bar separators have different height dimensions, and wherein movement of the plurality of separators having different height dimensions between the longitudinal bar pairs results in asymmetric vertical expansion of the cage.

41. The cage of claim 36, wherein the at least one spacer is a first and second spacer, and further comprising a threaded rod, wherein the two spacers are connected by the threaded rod extending along the vertical midline plane of the cage, wherein actuation of the threaded rod causes movement of both spacers towards each other within the space between the longitudinal bar pairs.

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42. The cage of claim 36, wherein:

- (a) the at least one spacer comprises a first spacer positioned in proximity to first ends of the longitudinal bars;
- (b) the at least one separator comprises a first separator positioned to be moved between the upper and lower bars of the first longitudinal bar pair to cause separation between at least a portion of the bars of said first longitudinal bar pair;
- (c) the at least one separator further comprises a second separator positioned to be moved between the upper and lower bars of the second longitudinal bar pair to cause separation between at least a portion of the bars of said second longitudinal bar pair, and wherein the cage further comprises;
- (d) a first connector pivotably connected to the first spacer and to the first separator; and
- (e) a second connector pivotably connected to the first spacer and to the second separator;
- (f) wherein movement of the first spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs; and
- (g) wherein movement of the first and second separators between the longitudinal bars of the first and second longitudinal bar pairs causes vertical separation between the longitudinal bars.

43. The cage of claim 42, wherein movement of the first spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs prior to movement of the first and second separators between the longitudinal bars of the first and second longitudinal bar pairs, which causes vertical separation between the longitudinal bars.

44. The cage of claim 42, wherein:

- (a) the at least one spacer further comprises a second spacer positioned in proximity to second ends of the longitudinal bars;
- (b) the at least one separator further comprises a third separator positioned to be moved between the upper and lower bars of the first longitudinal bar pair to cause separation between at least a portion of the bars of said first longitudinal bar pair;
- (c) the at least one separator further comprises a fourth separator positioned to be moved between the upper and lower bars of the second longitudinal bar pair to cause separation between at least a portion of the bars of said second longitudinal bar pair, and wherein the cage further comprises;
- (d) a third connector pivotably connected to the second spacer and to the third separator; and
- (e) a fourth connector pivotably connected to the second spacer and to the fourth separator;
- (f) wherein movement of the second spacer into the space between the longitudinal bar pairs causes horizontal separation of the longitudinal bar pairs; and
- (g) wherein movement of the third and fourth separators between the longitudinal bars of the first and second longitudinal bar pairs causes vertical separation between the longitudinal bars.

45. The cage of claim 44, further comprising a threaded rod, wherein the two spacers are connected by the threaded rod extending along the vertical midline plane of the cage, wherein actuation of the threaded rod causes movement of both spacers towards each other within the space between the longitudinal bar pairs.

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**46.** The cage of claim **36**, wherein the at least one spacer includes a cam surface configured to interact with surfaces of the longitudinal bar pairs, and further comprising a connector pivotably connecting the at least one spacer with the at least one separator.

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