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**Huwais**

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(54) **FLUTED OSTEOTOME AND SURGICAL METHOD FOR USE**

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**A61B 17/88** (2006.01)

(52) **U.S. Cl.**

CPC ..... **A61C 8/0089** (2013.01); **A61B 17/1604** (2013.01); **A61B 17/1615** (2013.01); **A61B 17/885** (2013.01)

(58) **Field of Classification Search**

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USPC ..... 433/102, 165-167, 172-173, 215, 76, 433/100, 144, 145; 206/63.5, 379; 606/79, 606/80, 84, 86 R, 87, 96, 159, 170, 180  
See application file for complete search history.

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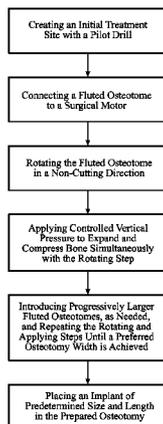
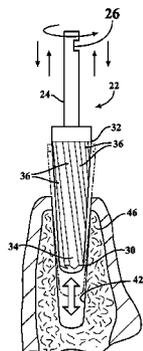
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(57) **ABSTRACT**

A surgical method and tool for expanding an initial osteotomy (42) to receive a bone implant (44). An osteotome (22) having a tapered working end (28) is inserted into the initial osteotomy (42). The initial osteotomy (42) is enlarged by simultaneously rotating and pushing the working end (28) of the tapered osteotome (22) into the osteotomy (42). When rotated in one direction the burnishing edges (40) concentrate the pushing and rotational force in outward normal and tangential component forces against the interior surface of the osteotomy (42) to incrementally expand the osteotomy (42) with little to no removal of bone material (46). When rotated in the opposite direction the burnishing edges cut the interior surface of the osteotomy. Progressively larger tapered osteotomes (22) are used until an osteotomy (42) of predetermined size is achieved.

**13 Claims, 12 Drawing Sheets**



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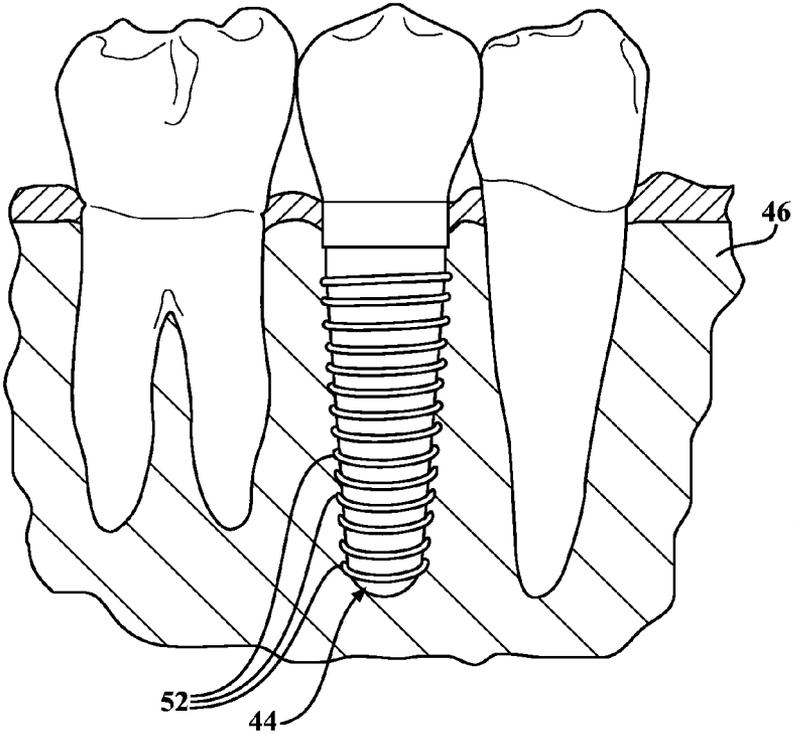
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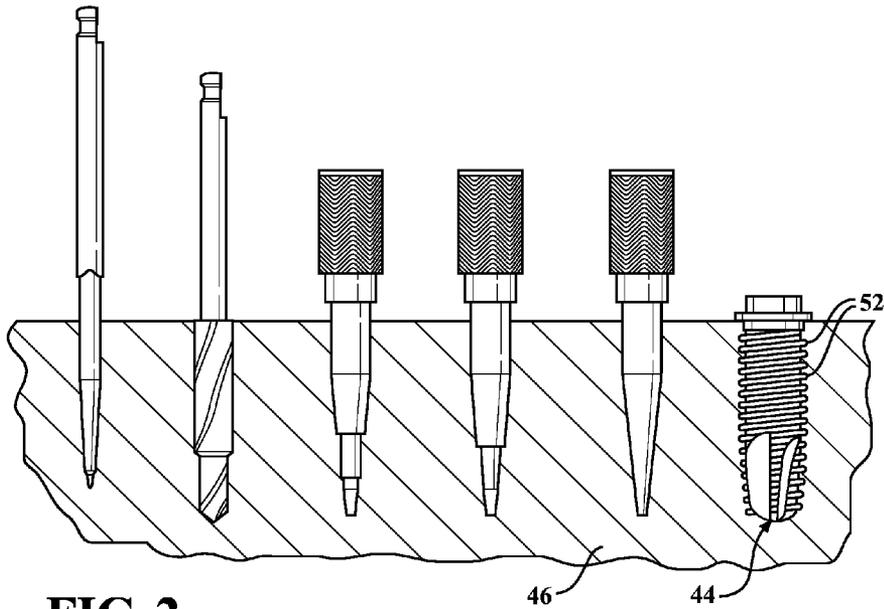
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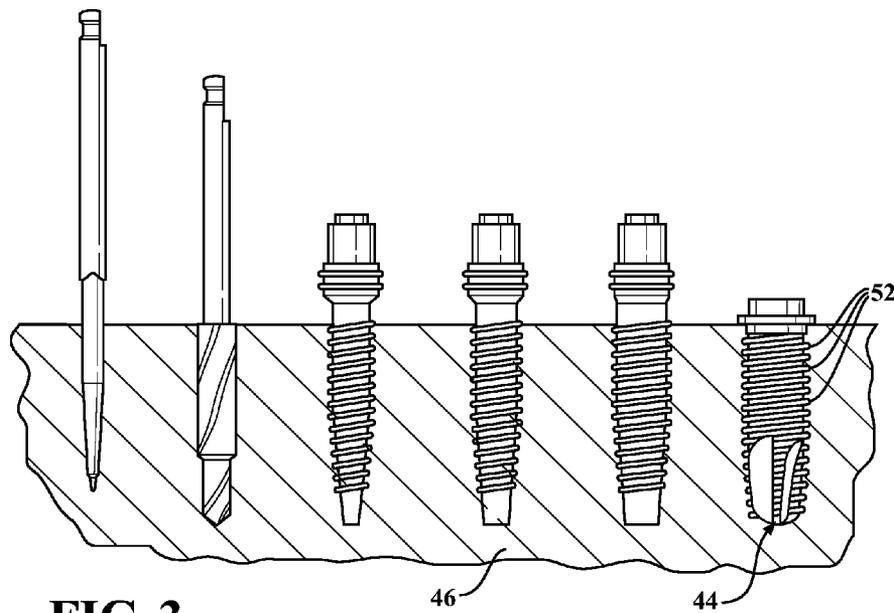
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**FIG. 1**



**FIG. 2**  
Prior Art



**FIG. 3**  
Prior Art

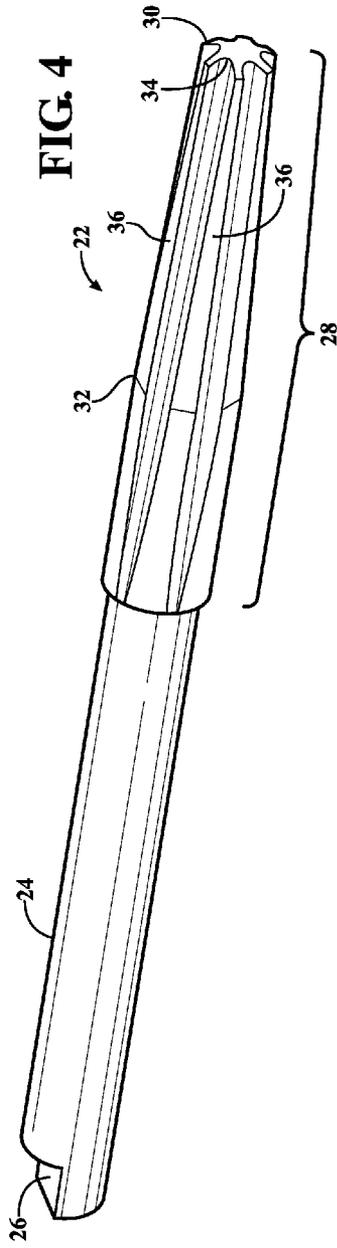


FIG. 5

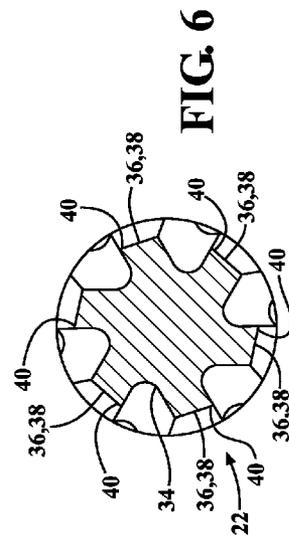
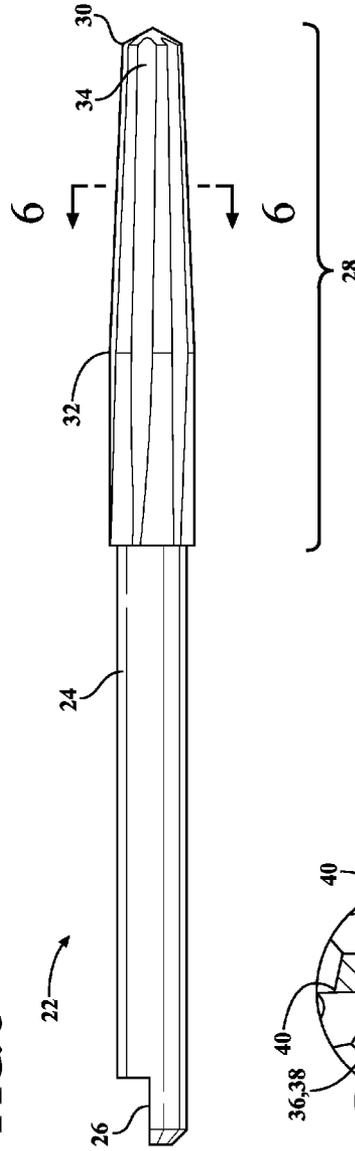
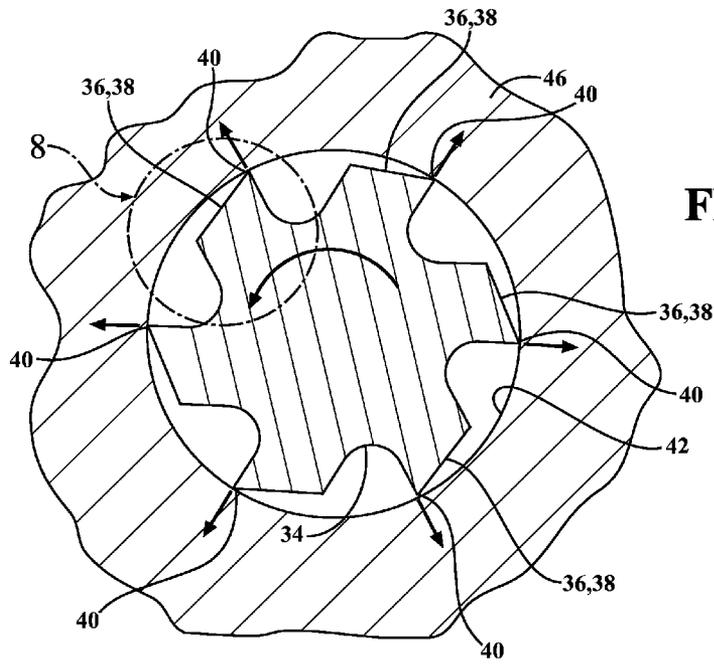
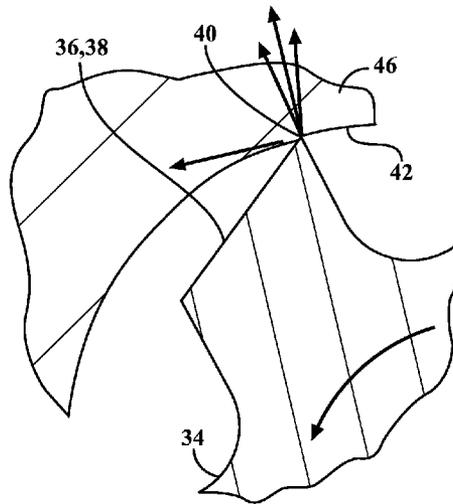


FIG. 6



**FIG. 7**



**FIG. 8**

FIG. 9

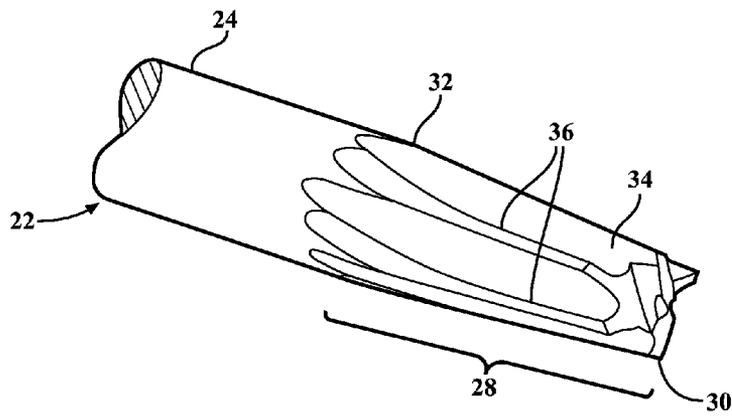
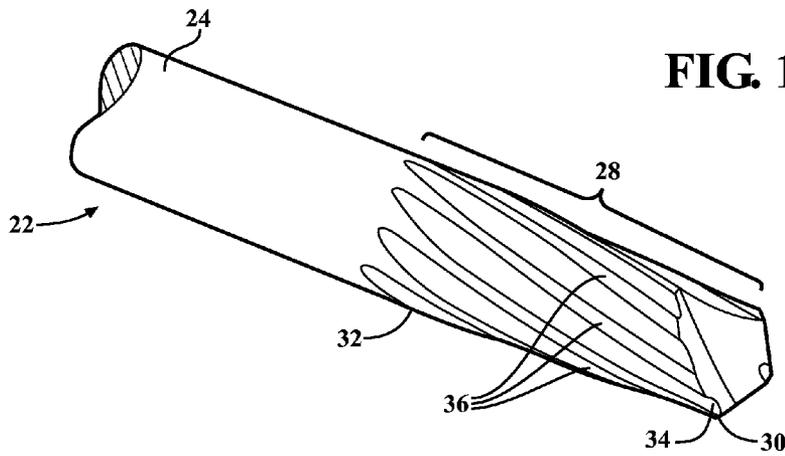


FIG. 10



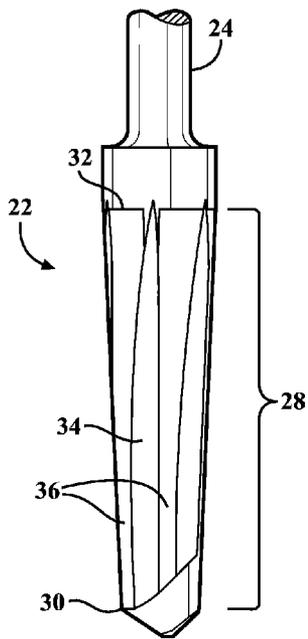


FIG. 11



FIG. 12

Prior Art

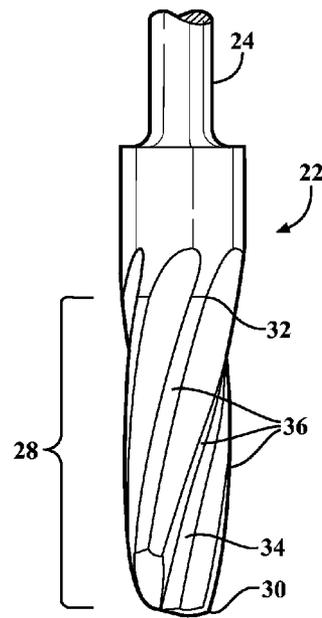
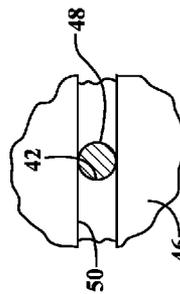
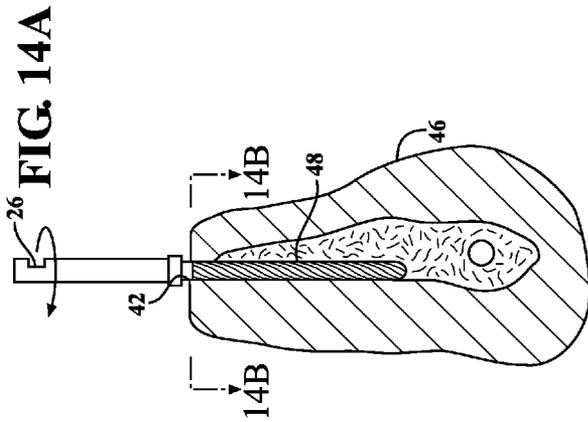
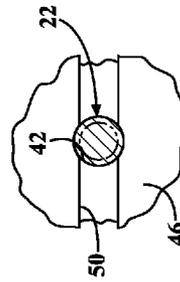
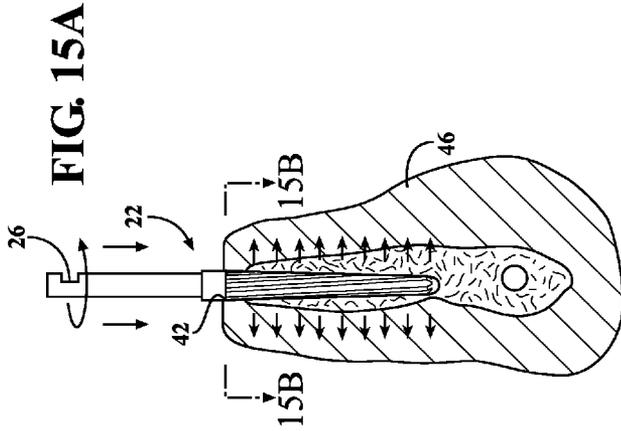
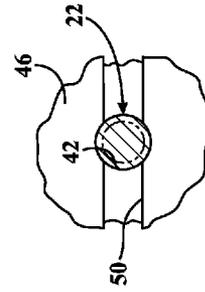
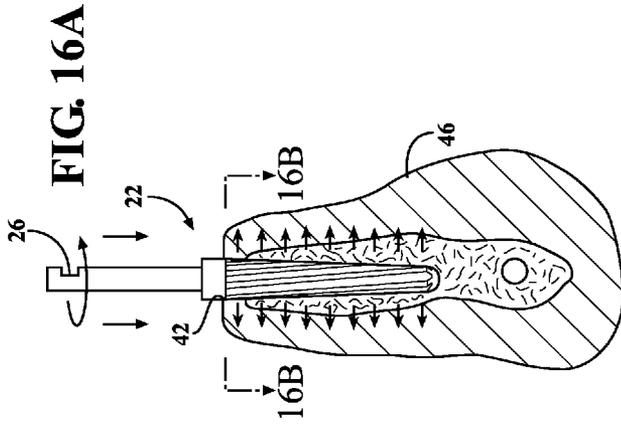


FIG. 13



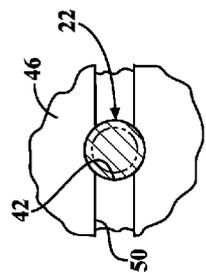
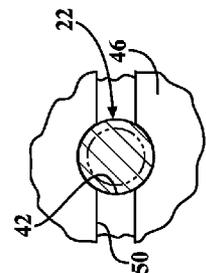
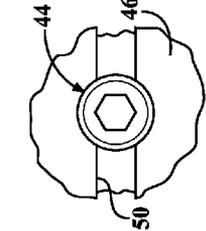
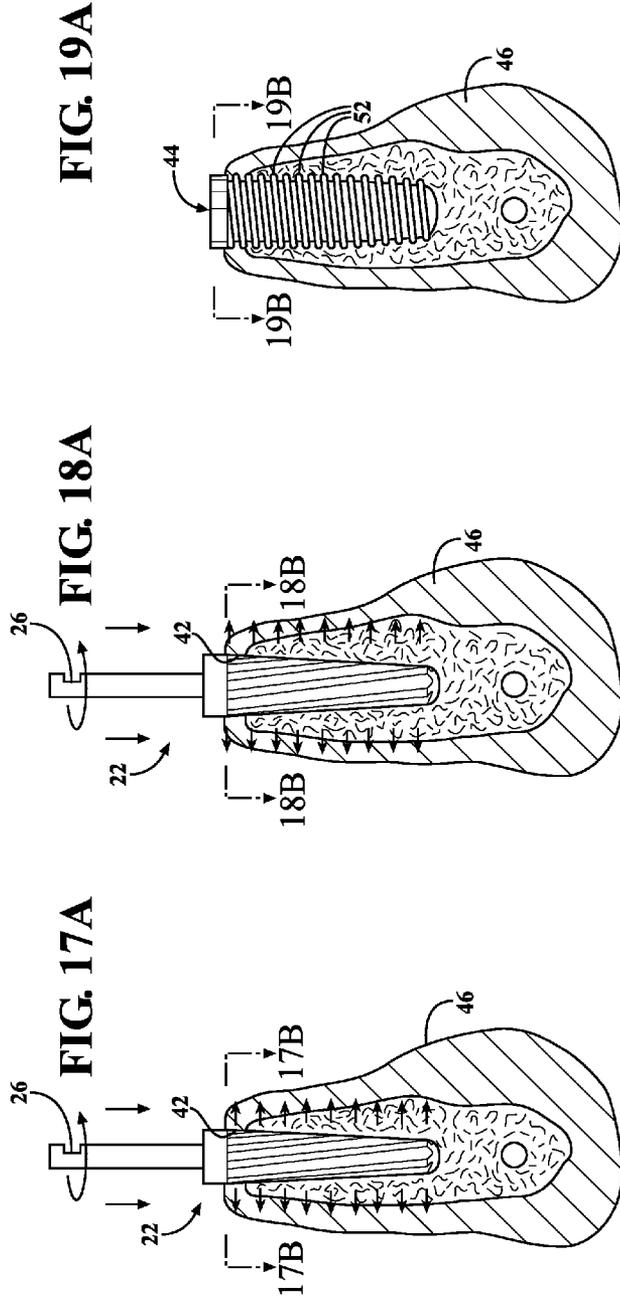


FIG. 19A

FIG. 18A

FIG. 17A

FIG. 19B

FIG. 18B

FIG. 17B

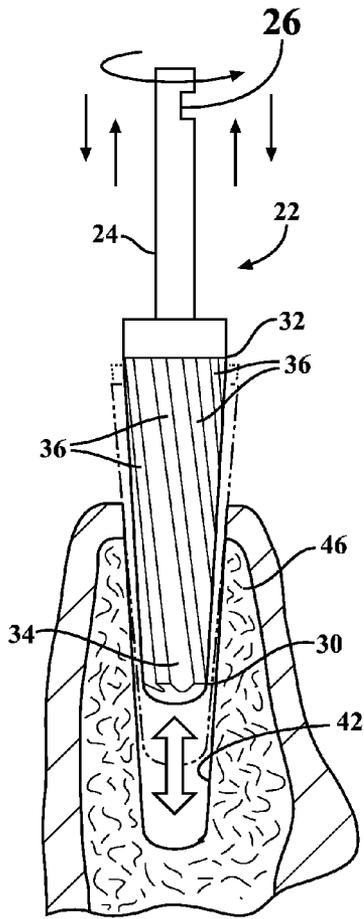


FIG. 20

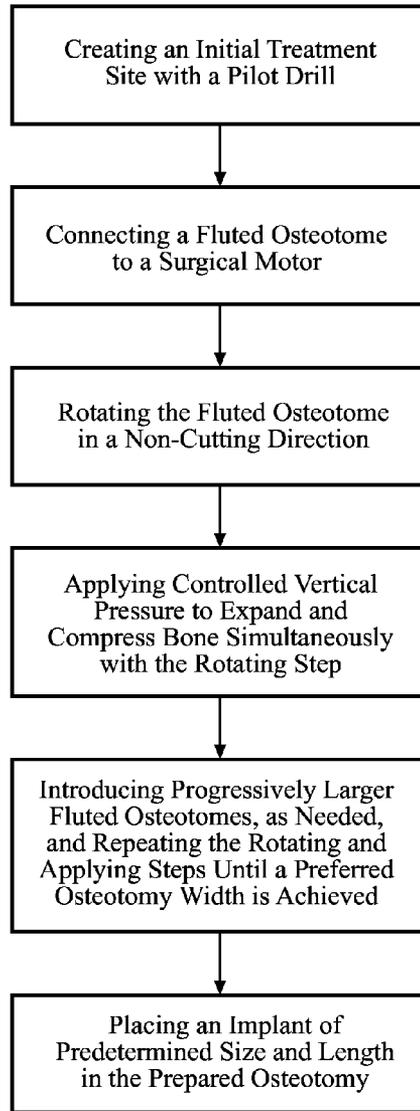


FIG. 21

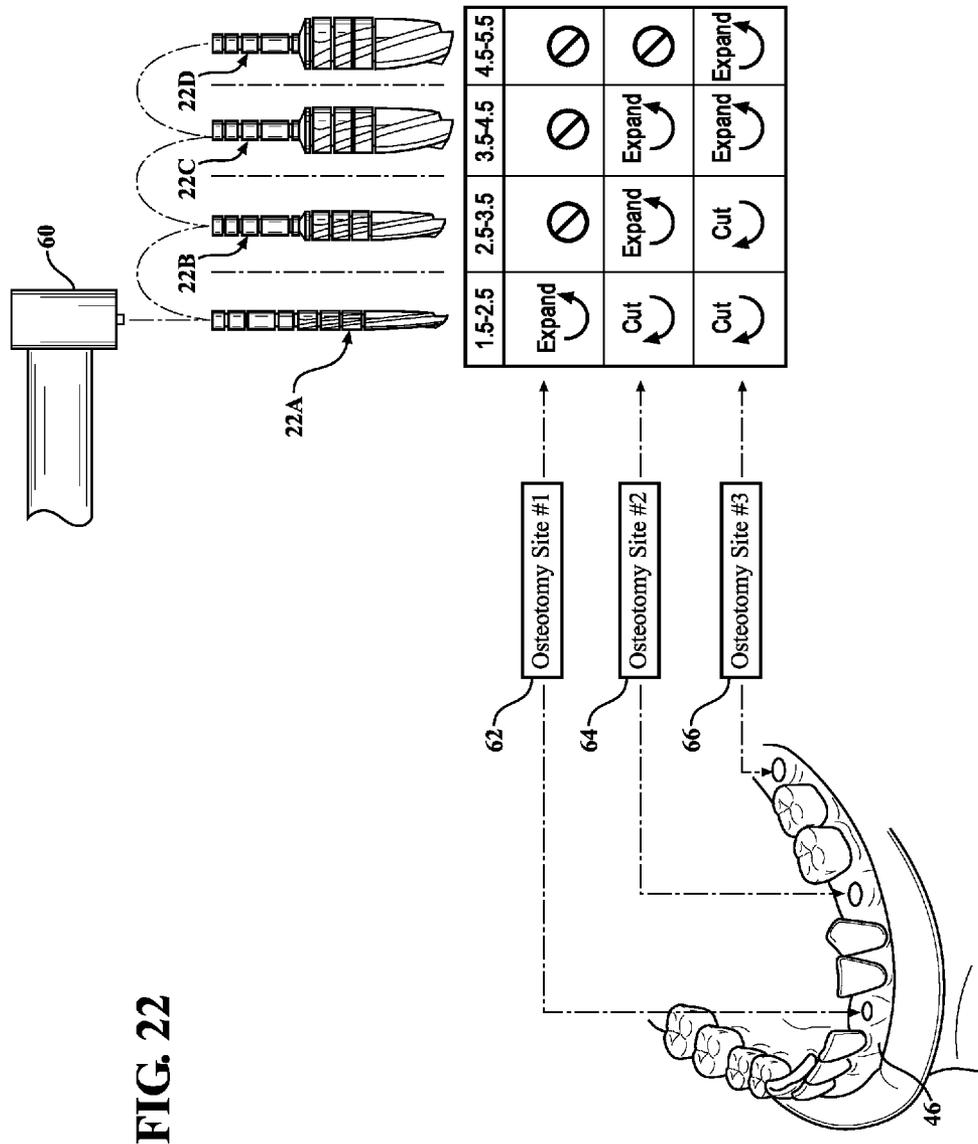
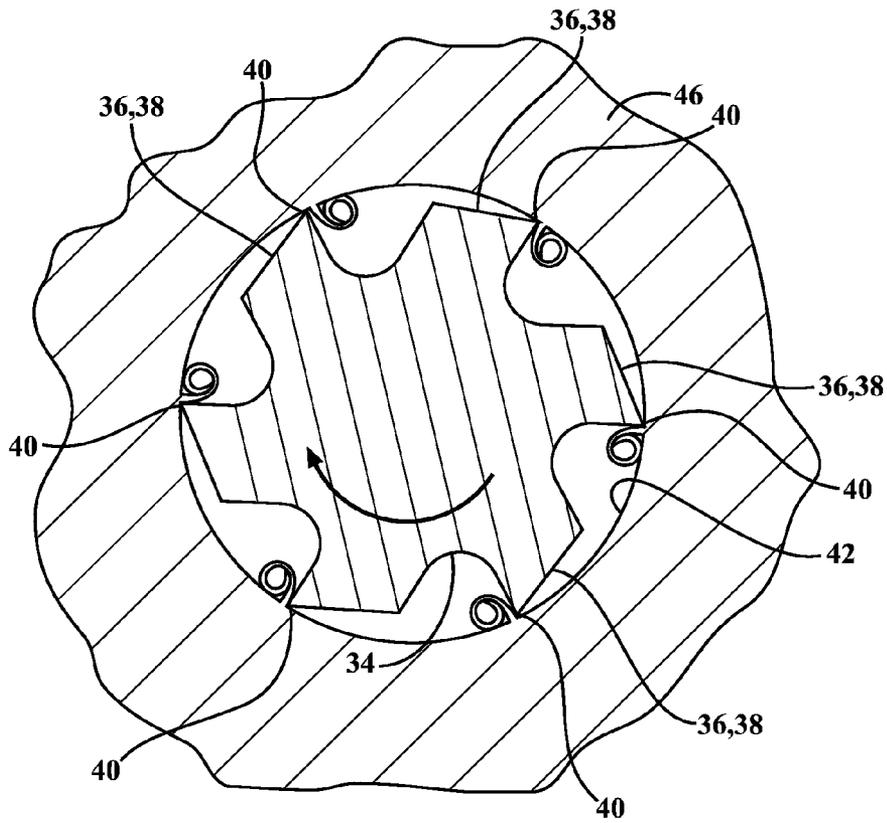


FIG. 22



**FIG. 23**

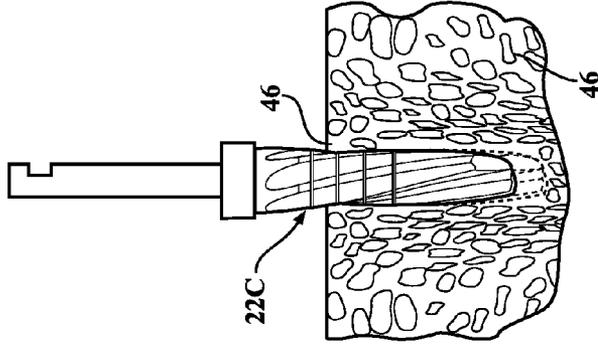


FIG. 24D

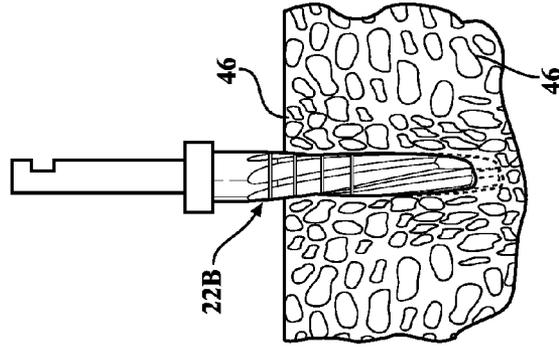


FIG. 24C

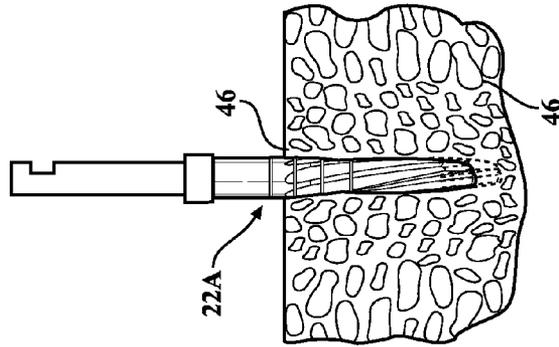


FIG. 24B

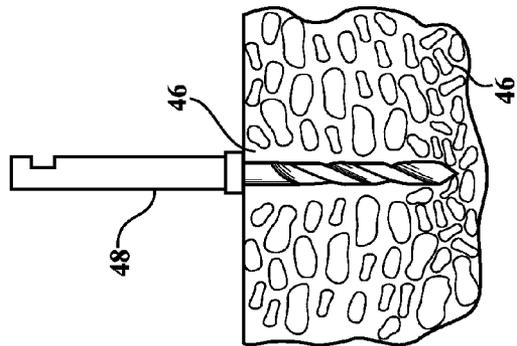


FIG. 24A

## FLUTED OSTEOTOME AND SURGICAL METHOD FOR USE

### CROSS REFERENCE TO RELATED APPLICATIONS

This application is a continuation-in-part of U.S. Ser. No. 13/427,391 filed Mar. 22, 2012, which claims priority to Provisional Patent Application No. 61/466,579 filed Mar. 23, 2011, the entire disclosures of each are hereby incorporated by reference and relied upon.

### BACKGROUND OF THE INVENTION

#### 1. Field of the Invention

The invention relates generally to osteotomes, and more particularly to surgical methods for expanding an initial osteotomy to receive an implant.

#### 2. Related Art

An implant is a medical device manufactured to replace a missing biological structure, support a damaged biological structure, or enhance an existing biological structure. Bone implants are implants of the type placed into the bone of a patient. Bone implants may be found throughout the human skeletal system, including dental implants in a jaw bone to replace a lost or damaged tooth, joint implants to replace a damaged joints such as hips and knees, and reinforcement implants installed to repair fractures and remediate other deficiencies, to name but a few. The placement of an implant often requires a preparation into the bone using either hand osteotomes of precision drills with highly regulated speed to prevent burning or pressure necrosis of the bone. After a variable amount of time to allow the bone to grow on to the surface of the implant (or in some cases to a fixture portion of an implant), sufficient healing will enable a patient to start rehabilitation therapy or return to normal use or perhaps the placement of a restoration or other attachment feature.

The present invention is directed toward the preparation of a bone implant cases where expansion of an initial osteotomy is required. A dental implant is shown in FIG. 1 for exemplary purposes as illustrative of the preparation steps customary in many bone implant applications. According to current techniques, at edentulous (without teeth) jaw sites that need expansion, a pilot hole is bored into the recipient bone to form the initial osteotomy, taking care to avoid the vital structures. The pilot hole is then expanded using progressively wider expander devices called osteotomes, manually advanced by the surgeon (typically between three and seven successive expanding steps, depending on implant width and length). See for example FIG. 2. Once the receiving hole has properly prepared, a fixture screw (usually self-tapping) is screwed into place at a precise torque so as not to overload the surrounding bone.

The osteotome technique has become widely utilized in situations requiring preparation of an osteotomy site by expansion of a pilot hole. By nature, the osteotome technique is a traumatic procedure. The instruments are advanced with the impact of a surgical mallet, which compacts and expands the bone in the process of preparing osteotomy sites that will allow implant placement. (FIG. 2.) Treatment of a mandibular site, for example, is often limited due to the increased density and reduced plasticity exhibited by the bone in this region. Other non-dental bone implant sites may have similar challenging density and plasticity characteristics. Additionally, since the osteotome is inserted by hammering, the explosive nature of the percussive force provides limited control over the expansion process, which often leads to unintentional

displacement or fracture of the labial plate of bone in dental applications. Many patients do not tolerate the osteotome technique well, frequently complaining about the impact from the surgical mallet. In addition, reports have documented the development of a variety of complications that result from the percussive trauma in dental applications, including vertigo and the eyes may show nystagmus (i.e., constant involuntary cyclical movement of the eyeball in any direction).

More recently, a technique has been developed for dental applications that allow the atraumatic preparation of implant sites by eliminating the use of a surgical mallet. This procedure is based on the use of a ridge expansion system that includes a bur kit and instruments known as motor-driven bone expanders, such as those marketed by Meisinger split control bone management system (Neuss, Germany). First a pilot hole is drilled at the implant site, then a series of progressively larger expander screw taps are introduced into the bone by hand or with motor-driven rotation, which decreases surgical trauma (as compared with hammer taps) while providing superior control over the expansion site. See for example FIG. 3. The thread pattern of the expander screw taps has been designed to compact bone laterally as the instrument advances into the osseous crest. This system allows expansion and preparation of implant sites in Type II and III bone, as well as compaction of Type IV bone. The Meisinger split control bone management system may be implemented with a so-called "expander bur" tool to prepare the initial pilot hole to receive the first expander screw tap. In dentistry, the term "bur" is usually synonymous with "cutter." The expander bur tool apparently grinds a taper on the inner wall of the pilot hole osteotomy that will readily accept the tapered shape of the first expander screw tap.

Since they are operated with an electric hand piece, the expander screw taps can be utilized in the anterior as well as posterior regions without impingement of the facial tissues or the positional limitations imposed by traditional osteotomes (unlike a more traditional mallet-driven osteotome which cannot easily reach for example the lower mandible posterior). Furthermore, the rotational control of the expansion permits treatment of the mandibular atrophic ridge. The system can be utilized by itself or with osteotomes and surgical drills to assist in the placement of a variety of implant design.

US Publication No. 2006/0121415 to Anitua Aldecoa describes the use of motor-driven tools and methods for expanding a human bone for the purpose of installing a dental implant. Similar to the progressive illustration shown in FIG. 3, a starter drill is used to create a pilot hole followed by the insertion of an expander screw tap type osteotome having a conical/cylindrical geometry with progressive cross-section. A surgical motor is used to rotate the osteotome at relatively low speeds. Another example of this technique is described in U.S. Pat. No. 7,241,144 to Nilo et al, issued Jul. 10, 2007. The entire disclosures of US Publication No. 2006/0121415 and U.S. Pat. No. 7,241,144 are hereby incorporated by reference.

In the prior art designs involving motor-driven bone expansion, the rotary speed of the expander screw tap is locked in a fixed relationship to the expansion rate of the osteotomy. This is because the expander tap threads cut into the bone and advance the expander tap deeper into the initial osteotomy with rotation. The "root" of the expander screw tap does the expanding work while vertical advance is controlled by pitch of threads and rotation speed. In other words, the thread pitch of the expander screw tap combined with its taper angle is fixed and cannot be altered by the surgeon. If a surgeon wishes to expand the bone more slowly, the only recourse is to turn the expander more slowly. Conversely, if they wish to

expand the bone more rapidly. the only option is to turn the expander tool more quickly. Thus, the rate of bone expansion is a direct and unalterable function of the rate at which the surgeon turns the expander tool, and the surgeon is unable to vary other parameters such as pressure and/or rotation rate to achieve an optimum expansion rate.

The utilization of motor-driven bond expanders served in the past (FIG. 3) as an innovative technique offering an atraumatic alternative to the traditional mallet-driven osteotomes (FIG. 2). These instruments also provide, at least arguably, a favorable increase in the control of the bone expansion, which facilitates implant-site preparation while allowing universal intraoral use. Nevertheless, there are many shortcomings of the present motor-driven bone expander screw tap techniques. These shortcomings include a relatively large number of intermediate progressive expansions steps due to the surgeon's inability to disassociate the tool rotation rate from the bone expansion rate. A typical osteotomy kit for dental applications may include 4-6 expander screw taps which make the kit cost relatively expensive. Another disadvantage is that each expander screw tap takes time to install and perhaps an equal amount of time to remove (i.e., un-screw). Because of the relatively large number of progressive expansions steps needed, this translates to a long surgical procedure which increases patient discomfort and procedure cost. Yet another disadvantage is that each rotary expansion step introduces some degree of error into the osteotomy. In dental applications for example, the surgeon's hand controlling the advancing expander screw tap is typically located outside the patient's mouth, which is laterally offset from the rotational axis of the expander tap. Thus, even though a surgical motor may be used to drive the expander tap, there is a very real possibility that the surgeon will introduce the some tilt or wobble inadvertently as the expander tap is advanced (or withdrawn) thus distorting the intended shape of the osteotomy or even worse provoking a lateral fracture in the bone.

This inexorable linking of tool rotation rate to bone expansion rate in all prior art rotary expander systems limits surgical control over the implant process, and in some cases may lead to unnecessary patient discomfort. There is therefore a need in the art for an improved surgical method for expanding an initial osteotomy to receive an implant in all bone applications, and tools therefor, that provide greater surgical control, are less costly, less likely to introduce error and that reduce patient discomfort.

#### SUMMARY OF THE INVENTION

According to a first aspect of this invention, a surgical method is provides for expanding an initial osteotomy to receive a bone implant. An osteotome is provided having a tapered working end. The tapered working end of the osteotome is inserted into an initial osteotomy. The initial osteotomy has an interior surface surrounded by bone. The initial osteotomy is enlarged by forcibly advancing the osteotome into the initial osseotomy. The inserting and enlarging steps are repeated, as needed, with progressively larger tapered osteotomes until an osteotomy of predetermined size is achieved. The invention is distinguished by the working end of the tapered osteotome having one or more longitudinally extending burnishing edges. The enlarging step includes simultaneously rotating and pushing the working end of the tapered osteotome into the osteotomy so that the one or more burnishing edges concentrate the pushing and rotational force through the burnishing edge in outward normal and tangential component forces against the interior sur-

face of the osteotomy to incrementally expand the osteotomy with little to no removal of bone material.

According to a second aspect of the invention, a surgical method is provided for expanding an initial osteotomy to receive a bone implant. An osteotome is provided having an upper end and a tapered working end. The working end of the tapered osteotome has one or more longitudinally extending burnishing edges. The upper end of the osteotome is locked in a drill motor and then rotated in a first rotary direction. The tapered working end of the osteotome is inserted into an initial osteotomy having an interior surface surrounded by bone. The initial osteotomy is then enlarged by pushing the working end of the tapered osteotome into the initial osteotomy and simultaneously rotating the osteotome in the first rotary direction so that the one or more burnishing edges cut against the interior surface of the osteotomy to expand the osteotomy by removal of bone material. Following this, the locking and the inserting and the enlarging steps are repeated but with a second larger tapered osteotome. The second larger osteotome is rotated in a second rotary direction by the drill motor which is reverse of the first rotary direction which has the effect of concentrating the pushing and rotational force through the burnishing edge in outward normal and tangential component forces against the interior surface of the osteotomy to incrementally expand the osteotomy with little to no removal of bone material.

Burnishing is the deformation of a surface due to stressed contact with another object. Burnishing is commonly used in metalworking as a cold forming process, without actual removal of metal, where a tool is rubbed on the metal surface of the pan with sufficient force to cause plastic flowing of the metal. The technique of burnishing is not commonly applied in the bone arts, and is heretofore not been applied in surgical procedures to expand an initial osteotomy for the purpose of receiving a bone implant.

This invention overcomes the disadvantages and shortcomings of prior art osteotome techniques offering an atraumatic alternative to the traditional mallet-driven osteotomes without any disadvantages of rotary expander screw tap systems. The present surgical method provides a highly controllable, relatively fast and effective technique for expanding an initial osteotomy to receive a bone implant. By forcibly rubbing the burnishing edges of the osteotome against the interior surfaces of the osteotomy, the bone material is effectively expanded and simultaneously compressed without creating excessive heat or trauma to the bone material. By simply rotating the osteotome in the opposite rotary direction, the tool can be made to expand by cutting. Because the concepts of this invention de-link rotation rate of the tool to the bone expansion rate, the surgeon is provided with substantially greater control which reduces the possibility for the introduction of inadvertent lateral forces prevalent with prior art expander screw tap devices. Surgical procedures according to the present methods can be carried out over less time, thereby resulting in less trauma and discomfort for the patient.

#### BRIEF DESCRIPTION OF THE DRAWINGS

These and other features and advantages of the present invention will become more readily appreciated when considered in connection with the following detailed description and appended drawings, wherein:

FIG. 1 is a modified cross-sectional view through jawbone showing an exemplary dental implant in bone composed of a lower fixture portion and an upper restoration, the dental implant being flanked on either side by natural teeth;

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FIG. 2 is a simplified schematic view illustrating a progressive surgical procedure according to the prior art wherein an initial osteotomy is progressively expanded to receive a dental implant using a traditional mallet-driven osteotome technique;

FIG. 3 is a view as in FIG. 2 but showing prior art expander screw tap technique which seeks to replace the mallet-driven osteotome technique of FIG. 2;

FIG. 4 is a perspective view of an osteotome according to one embodiment of the present invention;

FIG. 5 is a side elevation view of the osteotome shown in FIG. 4;

FIG. 6 is a cross-sectional view through the working end of the osteotome as taken generally along lines 6-6 in FIG. 5;

FIG. 7 is a cross-sectional view through the working end of an osteotome as taken generally along lines 6-6 in FIG. 5 but looking the other direction which, in use, is downwardly into an osteotomy, with radial lines emanating from the burnishing edges of the osteotome to indicate laterally outward expansive forces applied through the burnishing edges to the interior surface of an osteotomy;

FIG. 8 is an enlarged view of the area circumscribed at 8 in FIG. 7 and depicting the interaction between the burnishing edge of the flute of the osteotome and the interior surface of the osteotomy, with radial and longitudinal forces indicated by arrows;

FIG. 9 is a fragmentary perspective view showing the working end of an osteotome according to one embodiment of this invention having six straight flutes;

FIG. 10 is a fragmentary perspective view of an alternative osteotome configuration according to this invention wherein the working end is configured with ten spiral flutes;

FIG. 11 is a front elevation view of an osteotome embodiment according to this invention including six straight flutes;

FIG. 12 is a front elevation view of a prior art osteotome of the mallet-driven type shown for comparison purposes adjacent to the osteotome of FIG. 11;

FIG. 13 is a front elevation view of an alternative embodiment of an osteotome according to the subject invention including six helically spiraling flutes shown for comparison purposes adjacent the prior art osteotome of FIG. 12;

FIG. 14A is a simplified cross-sectional view through a bone prepared for surgical expansion with a pilot drill having created an initial osteotomy site;

FIG. 14B is a view taken generally along lines 14B-14B in FIG. 14A;

FIG. 15A is a simplified surgical procedure showing a progression from that of FIG. 14A with a first osteotome having been inserted into the initial osteotomy to expand the initial osteotomy into a first expanded osteotomy;

FIG. 15B is a view taken generally along lines 15B-15B of FIG. 15A;

FIG. 16A shows a further progression in the surgical procedure from that of FIG. 15A in which a second osteotome is inserted into the osteotomy and operated in a manner so as to expand the osteotomy further;

FIG. 16B is a view as taken generally along lines 16B-16B in FIG. 16A;

FIG. 17A shows a further progression in the expansion process from that depicted in FIGS. 14A and 15A and 16A;

FIG. 17B is a view taken from lines 17B-17B in FIG. 17A;

FIG. 18A shows a further progression in the expansion process from that depicted in FIGS. 14A and 15A and 16A;

FIG. 18B is a view taken from lines 18B-18B in FIG. 18A;

FIG. 19A is a cross-sectional view of the region as in FIG. 18A showing the installation of an implant into the fully enlarged prepared osteotomy;

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FIG. 19B is a view as taken along lines 19B-19B in FIG. 19A;

FIG. 20 is a simplified cross-sectional view showing a surgical procedure referred to herein as "bounce" where an osteotome according to the present invention is repeatedly pushed into the osteotomy and withdrawn while the osteotome remains spinning in a repetitive manner so as to enlarge the osteotomy while enabling the surgeon to manage heat build-up and make adjustments on-the-fly;

FIG. 21 is a simplified flow chart depicting the primary steps in the subject method;

FIG. 22 is a diagrammatic view illustrating by way of example the use of a surgical kit containing four osteotomes of progressively larger diameter according to the present invention in combination with a reversible drill motor to concurrently prepare three separate osteotomy sites in a human jaw using selective reversal of osteotome direction to enlarge each osteotomy either by cutting or burnishing without removing the osteotome from the surgical drill motor;

FIG. 23 is a cross-sectional view through the working end of an osteotome as in FIG. 7 but showing a reverse rotational direction to cut the interior surface of the osteotomy (and harvest bone material) rather than burnish; and

FIGS. 24A-D depict a cross-section through an osteotomy site showing the characteristic cellular structure of bone and the manner in which the bone material surrounding the osteotomy is progressively densified when one pilot drill and three osteotomes of progressively larger diameter according to the present invention are used to enlarge the osteotomy via burnishing.

#### DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT

Referring to the figures wherein like numerals indicate like or corresponding parts throughout the several views, a burnishing osteotome according to the present invention is generally shown at 22 in FIGS. 4-11 and 13. The osteotome 22 comprises a longitudinally extending shank 24. The shank 24 has a coupling 26 at one end thereof to attach to a rotary input such as from a surgical motor having speed and torque controls. The osteotome 22 also includes a working end 28. The working end 28 extends longitudinally from the shank 24 opposite the coupling 26. For dental applications as one example, the working end 28 may have a length of approximately 11-15mm, although longer or shorter lengths may also be fashioned to suit the application. As perhaps best shown in FIG. 5, the working end 28 has a taper along at least a portion of its length. A leading distal tip 30 of the working end 28 defines a minimal outer diameter, and an upper end 32 defines a maximum outer diameter of the tapered portion. For dental applications, the difference between the minimal outer diameter (at 30) and the maximum outer diameter (at 32) is preferably 1mm, although larger or smaller differences can be achieved with larger or smaller taper angles. Of course, for non-dental applications involving larger bone osteotomy sites, the dimensional scale of the osteotome 22 will typically be much larger.

Referring now to the cross-sectional views of FIGS. 6-8, the working end 28 is shown including a root shaft 34, from which at least one, but more preferably a plurality of flutes 36 extend. The plurality of flutes 36 may comprise at least three flutes 36. Preferably, the plurality of flutes 36 are equally circumferentially spaced from one another so that if for example there are four flutes 36 they are arranged 90° apart; six flutes 36 would be arranged 60° apart; eight flutes 36 would be arranged 45° apart; ten flutes 36 would be arranged

36° apart; and so on. The number of flutes 36 may be dictated for primarily practical reasons by the size of the osteotome 22, such that very small diameter osteotomes 22 have the fewest number of flutes 36 and progressively larger osteotomes 22 have progressively more flutes 36.

Each flute 36 extends radially outwardly to a crest 38 which defines the major diameter of the working end 28 as a function of length. That is because the working end 28 is tapered, its diameter changes along its length. Therefore the major diameter adjacent the distal tip 30 will be smaller than the major diameter adjacent the upper end 32. Thus, the major diameter is a function of length measured as it were from the distal tip 30. As perhaps best shown in FIG. 8, a longitudinally extending burnishing edge 40 is disposed along the outermost portion of the crest 38. The burnishing edge 40 is that specific portion of the crest 38 which lies along the major diameter of the tapered working end 28. In the embodiments illustrated in the drawing figures, the burnishing edge 40 in each instance is non-rotatably fixed relative to the root shaft 34. In applications such as dentistry where the relatively small osteotome sizes introduce practical manufacturing constraints, the burnishing edge 40 may take the form of a fixed ridge that is unitary (monolithic) with the flutes 36 and entire working end 28 of the osteotome 22. However, if manufacturing techniques and other practical constraints permitted, the burnishing edge 40 could be formed by a roller element in order to reduce friction and better manage heat build-up.

Returning again to FIG. 8, the crest 38 is shown as establishing a large negative rake angle leading up to the burnishing edge 40. A rake is an angle of slope measured from the leading face of the tool (the crest 38 in this case) to an imaginary line extending perpendicular to the surface of the worked object (e.g., inner bone surface of the osteotomy). Rake angle is a parameter used in various cutting and machining processes, describing the angle of the cutting face relative to the work. There are three types of rake angles used in metal working: positive, negative, and zero. However, in the preferred embodiment of this present application of a burnishing technique, a negative rake angle is employed, and more preferably a large negative rake angle. While the actual angle of the negative rake is adaptable to suit the particular specifications, including the relative roundness or sharpness of the burnishing edge 40, negative rake angles greater than about 45°, and even more preferably greater than 60°, have been found to produce satisfactory results. The large negative rake angle of the present osteotome 22 applies outward pressure at the burnishing edge 40 to create a compression wave ahead of the point of contact, loosely akin to spreading butter on toast. Downward pressure applied by the surgeon is needed to keep the burnishing edge 40 in contact with the bone surface of the osteotomy being expanded, that is, to keep it pushing on the compression wave. This is aided by the taper effect of the osteotomy and tool 22 to create lateral pressure (i.e., in the intended direction of expansion). The harder the surgeon pushes down, the more pressure is exerted laterally. This gives the surgeon complete control of the expansion rate irrespective to a large degree on the rotation speed of the osteotome 22. Thus, the burnishing effect's intensity depends on the amount of force exerted on the osteotome 22. The more force exerted, the quicker expansion will occur. The burnishing edges 40 along the respective crests 38 of the flutes 36 lap against bone and do the expanding work as the osteotome 22 is rotated in combination with downward pressure applied by the surgeon.

As shown in the enlarged and somewhat exaggerated for clarity FIG. 8, as the burnishing edge 40 drags across the bone, the force on the burnishing edge 40 can be decomposed

into two component forces: one normal to the bone's surface, pressing it outwardly, and the other tangential, dragging it along the inner surface of the osteotomy. As the tangential component is increased, the burnishing edge 40 will start to slide along the bone. At the same time, the normal force will deform the softer bone material. If the normal force is low, the burnishing edge 40 will rub against the bone but not permanently alter its surface. The rubbing action will create friction and heat, but this can be controlled by the surgeon by altering, on-the-fly, the rotation speed and/or pressure and/or irrigation flow. As will be described subsequently in connection with FIG. 20, because the working end 28 of the osteotome 22 is tapered, the surgeon may at any instant during the surgical procedure lift the burnishing edges 40 away from contact with the surface of the bone to allow air cooling and/or irrigation. This can be done in a controlled "bouncing," i.e., axially reciprocating, fashion where pressure is applied in short bursts with the surgeon continuously monitoring progress and making fine corrections and adjustments. Conversely, as the normal force increases, eventually the stresses in the bone's surface exceed its yield strength. When this happens, the burnishing edge 40 will plow through the surface and create a trough behind it. The plowing action of the burnishing edge 40 thus progressively enlarges the osteotomy. While the elastic properties of bone are well-known, if the load imposed exceeds the bone's ability to deform elastically, it will deform further and change shape permanently by plastic deformation. The permanent change in shape is believed to be associated with micro-cracks that allow energy release, a compromise that is a natural defense against complete fracture. If these micro-cracks are small, the bone remains in one piece while the osteotomy expands. Forcibly pushing the rotating working end into the osteotomy causes the burnishing edges to sweep against the interior surface of the osteotomy and thereby expand the osteotomy by incremental plastic deformations that cause a progressive enlargement of the osteotomy beginning adjacent the open end and developing in a frustoconical pattern downwardly into the osteotomy.

Expansion of the osteotomy occurs when the burnishing edge 40 is rotated against the bone surface of the osteotomy and downward pressure is applied by the surgeon. This has the effect of causing, at the same time rotation and translation of the burnishing edge 40, but in a manner that does not positively link rotation and translation as in prior art expander screw tap devices. The osteotomy, therefore, is formed into the final size ready to receive the fixture portion of an implant by a series of small incremental plastic deformations created by sweeps of successive burnishing edges 40 pressed hard against the interior surface of the osteotomy. Each such plastic deformation is followed by a short interval of rest before the arrival of the next successive burnishing edge 40. Additional discussion concerning the effects of burnishing on the bone structure is described below in connection with FIGS. 24A-D.

The burnishing edge 40 is shown in FIG. 8 comprising a chisel-like shape held at the previously described large negative rake angle. However, those of skill will appreciate that the burnishing edge 40 could be formed by other crest 38 profile shapes, such as rounded or lobed designs, provided the manufacturing techniques required to make such an alternative profile were found to be cost-justified in comparison with that of the profile as shown in FIGS. 7 and 8. Furthermore, as described below in connection with FIG. 23, the chisel-like shape of the preferred embodiment is useful as a cutting tool when rotated in reverse direction.

Turning now to FIGS. 9-13, the illustrations depict various embodiment in which the flutes 36, and thus by extension the

burnishing edges 40, may be formed either with no twist, i.e., straight as in FIGS. 9 and 11, or with a spiral twist along, the length of the working end 28 as in FIGS. 10 and 13. A prior art osteotome of the mallet-driven type is shown for side-by-side comparison purposes in FIG. 12. The spiraling direction of the flutes 36 can be set to either raise debris out of the osteotomy when rotated in a clockwise direction or push debris down into the osteotomy when rotated in a clockwise direction. Said another way, spiraling direction of the flutes 36 can be set to either raise debris out of the osteotomy when rotated in a burnishing direction or push debris down into the osteotomy when rotated in a burnishing direction. The osteotomes 22 shown in FIGS. 22 and 24A-D, for example, are arranged with flute 36 spirals that tend to lift debris out of the osteotomy when rotated in a counter-clockwise (burnishing) direction.

By way of example, FIGS. 14A-20 depict a progression of surgical steps for expanding an initial osteotomy 42 to receive a dental implant 44. Although a dental example is used in FIGS. 14A-20 and 22 must be appreciated that the present invention can be used in non-dental surgical procedures, such as those applied by orthopedic surgeons and perhaps any other procedure requiring creation or enlargement of an osteotomy site with the beneficial bone densification attributes of the present invention. Typically as a first step an initial osteotomy site is prepared by exposing bone 46, and then drilling a pilot hole into the bone 46 with a pilot drill 48. This is shown in FIG. 14A, and may be accomplished with a typical prior art surgical pilot drill 48 turned in a standard clockwise direction. The pilot hole in this instance comprises the initial osteotomy 42. In some cases, the surgeon may decide it is beneficial to saw a groove 50 along the bone ridge as seen in FIG. 14B. The sawed groove 50 typically intersects the pilot hole 42 along the ridge of the bone 46. The surgeon may decide to first drill the pilot hole and then saw the groove 50, or vice versa, it being understood that the groove 50 is an ancillary surgical feature.

A first osteotome 22 according to the present invention is operatively connected to a surgical motor (not shown) through its coupling 26 feature. Then the working end 28 of the first osteotome 22 is inserted into an initial osteotomy 42. The interior surface of the initial osteotomy 42 is surrounded by bone 46. If the diameter of the pilot drill 48 is, for example 15 mm, then preferably the major diameter of the working end 28 of the first osteotome 22 adjacent the leading distal tip 30 is also 1.5 mm so that it follows easily the pilot hole. Because of the widening taper, the major diameter of the working end 28 adjacent the upper end 32 is larger than the initial osteotomy. This may be, for example, 2.5 mm. At these exemplary dimensions, a first osteotome 22 having four equally spaced flutes 36/burnishing edges 40 of straight or helical twist has been found to provide satisfactory results. More or fewer flutes 36/burnishing edges 40 are certainly possible.

The initial osteotomy 42 is enlarged in a next step of the procedure by forcibly advancing the working end 28 of the first osteotome 22 into the initial osteotomy 42 to the desired depth, which is depicted in FIG. 15A. Depth markings in the form of laser-etched stripes may be applied to the working end 28 to indicate customary depths (as measured from the distal tip 30) of, for example, 7mm, 10mm, 13mm and 15mm. This forcible advancing includes simultaneously rotating and pushing the working end 28 of the first tapered osteotome 22 into the osteotomy 42 so that its one or more burnishing edges 40 concentrate the pushing and rotational force in outward normal and tangential component forces (FIG. 8) against the interior surface of the osteotomy 42. FIG. 15A illustrates a counter-clockwise rotation of the osteotome 22, but that

direction is merely preferred and can be reversed with suitable alterations made to the shape and/or rake angle of the osteotome 22. Although the surgeon may vary the rotational speed of the osteotome 22 according to the dictates of the situation in their judgment, experimental results indicate that rotation speeds between about 200-1200 RPM and torque settings between about 15-50 Ncm provide satisfactory results. More preferably rotation speeds between about 600-1000 RPM and torque settings between about 20-45 Ncm provide satisfactory results. And still more preferably, rotation speeds in the range of 800-900 RPM and torque settings of about 35 Ncm provide satisfactory results.

As perhaps best shown in FIG. 20, the enlarging step may include the controlled practice of bouncing the burnishing edges 40 into and out of contact with the interior surface of the osteotomy 42 while continuously rotating the osteotome 22. This practice is unachievable using prior art osteotome tools and techniques (as shown in FIGS. 2, 3 and 12). However, because the subject osteotome 22 has a tapered working end 22 and only the burnishing edges 40 are in contact with the interior surface of the osteotomy 42, the surgeon may at any time lift the working end 28 out of contact to evaluate progress, manage heat, irrigate, adjust approach, or make other corrections. In fact, the surgeon may practice a very controlled technique whereby the burnishing edges 40 are repeated and successively pushed into and pulled out of the osteotomy 42 in a sort of bouncing maneuver. Although this bouncing technique is not required for proper execution of the method, the novel tool shape and other features of this invention enable the bouncing technique if and whenever the surgeon warrants.

It should also be mentioned that if the surgeon warrants, the osteotome 22 may be rotated in the opposite direction (e.g., clockwise in these examples) and utilize the osteotome 22 to enlarge the osteotomy 42 by cutting or excavating bone material from the osteotomy 42 rather than via compression and plastic deformation. This technique of reversing rotation of the osteotome 22 as an intentional step during the surgical expansion procedure is described more fully below in connection with FIGS. 22 and 23.

When the desired depth (approximately 6-20 mm in dental applications; significantly larger in other medical applications) of the working end 28 has been advanced into the osteotomy the resultant effect is an incremental expansion of the osteotomy 42 to the dimensions of the working end 28 with little to no removal of bone material 46. The first osteotome 22 is then removed from the osteotomy 42 to reveal a first enlarged osteotomy 42. The first enlarged osteotomy 42 is fully prepared and ready to receive an implant 44 if, in this example with the given dimensions, its fixture portion is sized at about a 3.0mm diameter.

If the fixture portion of the implant 44 is larger than 3.0mm (continuing with this dental-specific example for purposes of illustration), then the first enlarged osteotomy 42 must be enlarged still further. This is accomplished by repeating the inserting and enlarging steps with progressively larger tapered osteotomes 22, as needed, until an osteotomy 42 of predetermined size is achieved. More specifically, as shown in FIG. 16A, a second osteotome 22 having a tapered working end 28 that is larger in diameter than the first osteotome 22, is operatively connected to the surgical motor (not shown). The tapered working end 28 of the second osteotome 22 is inserted into the first enlarged osteotomy 42. Using the previously described exemplary dimensions, the major diameter of the working end 28 of the second osteotome 22 adjacent the leading distal tip 30 is 2.5mm so that it follows easily the first enlarged osteotomy 42. Because of the widening taper, the

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major diameter of the working end **28** adjacent upper end **32** is, for example, 3.5 mm. At these exemplary dimensions, the second osteotome **22** having six equally spaced flutes **36**/burnishing edges **40** of straight or helical twist has been found to provide satisfactory results. More or fewer flutes **36**/burnishing edges **40** are certainly possible.

The surgeon proceeds to further enlarge the first enlarged osteotomy **42** by forcibly advancing the second osteotome **22** into the first enlarged osteotomy **42** to create a second enlarged osteotomy **42**. As before, the advancing step is comprised of simultaneously rotating and pushing the working end **28** of the second tapered osteotome **22** to a desired depth into the osteotomy **42** so that its one or more burnishing edges **40** concentrate the pushing and rotational force in outward normal and tangential component forces (FIG. **8**) against the interior surface of the osteotomy **42**. When the full length (approximately 11-15mm) of the working end **28** has been advanced into the osteotomy **42**, the second osteotome **22** is then removed from the osteotomy **42** to reveal a second enlarged osteotomy **42**. The second enlarged osteotomy **42** is fully prepared and ready to receive an implant **44** if in this example with the given dimensions, its fixture portion is sized at about a 4.0mm diameter.

If the fixture portion of the implant **44** is larger than 4.0mm (continuing with this dental-specific example for purposes of illustration), then the second enlarged osteotomy **42** must be enlarged still further. This is accomplished by repeating the inserting and enlarging steps with a progressively larger tapered osteotome **22**. FIG. **17A** illustrates this scenario where a third osteotome **22** is operatively connected to the surgical motor. Its tapered working end **28** is inserted into the second enlarged osteotomy **42**. Using the previously described exemplary dimensions, the major diameter of the third osteotome **22** adjacent its leading distal tip **30** is 3.5mm, and adjacent its upper end **32** may, for example, be 4.5mm. At these exemplary dimensions, the third osteotome **22** may have eight equally spaced flutes **36**/burnishing edges **40** of straight or helical twist, although more or fewer flutes **36**/burnishing edges **40** are certainly possible.

The surgeon proceeds to further enlarge the osteotomy **42** by simultaneously rotating and pushing the working end **28** of the third tapered osteotome **22** into the osteotomy **42** so that its one or more burnishing edges **40** concentrate the pushing and rotational force in outward normal and tangential component forces (FIG. **8**) against the interior surface of the osteotomy **42**. When the desired depth (approximately 7-15mm) of the working end **28** has been advanced into the osteotomy **42**, the third osteotome **22** is then removed from the osteotomy **42** to reveal a third enlarged osteotomy **42**. The third enlarged osteotomy **42** is fully prepared and ready to receive an implant **44** if, in this example with the given dimensions, its fixture portion is sized at about a 5.0mm diameter.

If the fixture portion of the implant **44** is larger than 5.0mm (continuing with this dental-specific example for purposes of illustration), then the third enlarged osteotomy **42** must be enlarged still further. This is accomplished by repeating the inserting and enlarging steps with a progressively larger tapered osteotome **22**. FIG. **18A** illustrates use of a fourth osteotome **22** having (for example) a major diameter adjacent its leading distal tip **30** of 4.5mm, and adjacent its upper end **32** of 5.5mm. At these exemplary dimensions, the fourth osteotome **22** may have ten equally spaced flutes **36**/burnishing edges **40** of straight or helical twist, although more or fewer flutes **36**/burnishing edges **40** are certainly possible.

The surgeon proceeds to further enlarge the third enlarged osteotomy **42** by simultaneously rotating and pushing the working end **28** of the fourth tapered osteotome **22** into the

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osteotomy **42**. As before, the one or more burnishing edges **30** concentrate the pushing and rotational forces against the interior surface of the osteotomy **42**. When the desired depth (approximately 7-15mm) of the working end **28** has been advanced into the osteotomy **42**, the fourth osteotome **22** is then removed from the osteotomy **42** to reveal a fourth enlarged osteotomy **42**. The fourth enlarged osteotomy **42** is fully prepared and ready to receive the implant **44** if, in this example with the given dimensions, the fixture portion is sized at about a 6.0mm diameter.

To complete the example, FIG. **19A** shows the 6.0mm diameter fixture portion of an implant **44** installed into the fourth enlarged osteotomy **42**. The step of installing a fixture portion of an implant **44** includes directly engaging an exterior anchoring thread form **52** of the fixture portion into the expanded osteotomy formed by the burnishing edge **40**.

FIG. **21** provides an exemplary flow diagram of the method of this invention according to one preferred method. The surgical method of this invention, and in particular the diameter to which the osteotomy **42** can be ultimately expanded, is of course limited by the physical properties of the bone **46** and other factors. In other words, the steps of expanding as described herein are directly related to the final desired fixture **44** diameter but also related to the ability of the bone **46** to plastically deform (via the above-described micro-cracks) without fracturing. For example, in some conditions it is not possible for even a skilled surgeon to take a 3mm width of bone **46** and use the procedures of this invention to expand an osteotomy **42** all the way to 5.5mm without fracturing the bone **46**. However, it may be possible to expand the osteotomy **42** to a slightly smaller 4.5mm so that it will receive a 5mm diameter implant **44**. Thus, it should be understood that bone's ability to plastically deform without fracturing dictates how much expansion can be achieved, and also dictates at which step the surgeon must stop the expansion process to avoid fracturing the bone **46** and/or the use of counter-rotation cutting as described below in connection with FIG. **22**.

The surgical method of this invention enables an expansion of an initial osteotomy **42** to receive a bone implant **44** that is significantly less traumatic than other prior art osteotome techniques, that is faster than other prior art osteotome techniques, that is able to reach previously difficult to reach areas (e.g., the lower mandible posterior), that requires fewer progressive steps (and tools) to achieve a final enlarged osteotomy than other prior art osteotome techniques, and that is significantly better at managing heat build-up than other prior art osteotome techniques. Heat management is enhanced through irrigation into the osteotomy (difficult with prior art techniques) and also by maintaining a separation space between the root shaft **34** and the bone interior surface of the osteotomy **42**. This separation space means less friction and also the opportunity for some degree of convective cooling.

FIG. **22** is a diagrammatic view illustrating by way of example the use of a surgical kit containing four osteotomes **22A-D** of progressively larger diameter according to the present invention in combination with a reversible surgical drill motor **60** to concurrently prepare three separate osteotomy sites **62**, **64** and **66**, respectively, in a human jaw bone **46** using selective reversal of osteotome direction to enlarge each osteotomy either by cutting or burnishing without removing a given osteotome **22** from the surgical drill motor **60**. Although the example is presented here again in the context of a dental application, those of skill in the art will appreciate that the described techniques are adaptable to non-

dental applications including, but not limited to, joint replacement and bone fixations generally.

In this example, a first osteotomy site **62** is located in the front of the mandible bone **46** where the bone width is relatively narrow. The composition of the bone **46** in the region of the first osteotomy site **62** may be described as predominantly Type II. A second osteotomy site **64** is located slightly posterior of the first site **62** in a region of the mandible that has moderate bone **46** width. The composition of the bone **46** in the region of the second osteotomy site **64** may be described as generally a combination of Types II and III. A third osteotomy site **66** is located in a molar region of the mandible and is surrounded by a relatively generous bone **46** width. The composition of the bone **46** in the region of the third osteotomy site **66** may be described as predominantly Type III. Due to the varying width and composition of bone **46** at sites **62**, **64** and **66**, the surgeon does not wish to apply exactly the same technique and procedure to each osteotomy. The novel attributes of the present invention give the surgeon the ability to concurrently prepare all three osteotomy sites **62-66** in different ways.

In this example each osteotomy site **62-66** is presumed to have an initial osteotomy prepared by first drilling a pilot hole of 1.5mm. (Of course, the circumstances of any given surgical application, whether dental or non-dental in nature, will dictate the size of initial osteotomy and other characteristics of the operation.) The surgeon locks or otherwise installs the first osteotome **22A** into the drill motor **60** and sets the rotational direction to counter-clockwise. The surgeon then pushes the first osteotome **22A** into the first osteotomy site **62** in the manner described above to expand through burnishing. However, due to the different compositional nature of the second **64** and third **66** osteotomy sites, the surgeon chooses to enlarge by cutting rather than burnishing. To affect this, the surgeon reverses the rotational direction of the drill motor **60** to clockwise without removing the first osteotome **22A** from the drill motor **60**. Then, using a similar pushing motion, the surgeon enlarges the second **64** and third **66** osteotomy sites by removing bone material which may, if desired, be harvested. FIG. **23** represents a cross-sectional view through the working end of an exemplary osteotome **22** as in FIG. **7**, but showing a reverse rotational direction to cut the interior surface of the osteotomy **62** and harvest bone material (shown as chips or shavings in front of burnishing edge **40**).

At this stage in the hypothetical example, the first osteotomy site **62** has been expanded as much as the surgeon desires; no further expansion is needed of the first osteotomy site **62**. However, the second **64** and third **66** osteotomy sites both require additional expansion. The surgeon then installs the second osteotome **22B** into the drill motor **60** and sets the rotational direction to counter-clockwise. Skipping the completed first osteotomy site **62**, the surgeon then expands the second osteotome **22B** into the second osteotomy site **64** through burnishing in the manner described above. Due to the different compositional nature of the third osteotomy site **66**, the surgeon chooses to enlarge by cutting rather than burnishing. To affect this, the surgeon reverses the rotational direction of the surgical motor **60** to clockwise without removing the second osteotome **22B** from the surgical motor **60**. Then, using a similar pushing motion, the surgeon enlarges the third osteotomy site **66** by removing bone material (which may, if desired, be harvested).

Once the remaining two osteotomy sites **64**, **66** have been enlarged by the second osteotome **22B**, the surgeon locks or otherwise installs the third osteotome **22C** into the drill motor **60** and sets the rotational direction to counter-clockwise. Again skipping the completed first osteotomy site **62**, the

second **64** and third **66** osteotomy sites are enlarged by burnishing. In both cases, the surgical motor **60** is set to turn in the counter-clockwise direction. The second osteotomy site **64** has now been expanded as much as the surgeon desires; no further expansion is needed of the second osteotomy site **66**. However, the third osteotomy site **66** still requires additional expansion. Therefore, the surgeon installs the fourth osteotome **22D** into the drill motor **60** and sets the rotational direction to counter-clockwise. Skipping the completed first **62** and second **64** osteotomy sites, the third **66** osteotomy site is enlarged by burnishing using the previously described techniques. Implants (or fixture portions of implants) can now be installed at each osteotomy site **62-66**. The surgeon places a 3.0-3.25 mm implant into the first osteotomy site **62**, a 5.0 mm implant into the second osteotomy site **64**, and a 6.0 mm implant in the third osteotomy site **66**.

Those of skill in the art will recognize the substantial improvement in convenience and efficiency the present invention affords by allowing a surgeon to concurrently prepare a plurality of osteotomy sites coupled with the ability to expand one site by burnishing and another site by cutting without removing the osteotome **22** from the drill motor **60**. This advantage is of course not exclusive to concurrent multi-site applications, and is in addition to the previously described advantages of significantly reduced trauma, increased speed, improved access to difficult areas, and better heat management.

FIGS. **24A-D** depict a cross-section through a typical osteotomy site showing the characteristic cellular structure of bone **46** and the manner in which the bone material surrounding the osteotomy **42** is progressively densified when one pilot drill **48** and three osteotomes **22A-C** of progressively larger diameter according to the present invention are used to enlarge the osteotomy **42** via the present burnishing technique.

Bränemark classification of bone includes type I, II, III and IV. Type I is homogeneous compact bone; Type II bone has a thick cortical layer and a dense core; Type III bone has a thin cortical layer and a trabecular core of good strength; Type IV bone has a thin cortical layer and a cancellous core of poor strength. A dense crestal cortex is generally favored for initial fixation of an implant. Often the implant can be placed to take advantage of one or both of the buccal and lingual cortical plates. Placing implants in Type III and IV bone is more challenging than in Types I and II. Moreover, the quality of bone can be extremely variable in a single location. It is likely that at some osteotomy sites the bone **46** may contain voids, fatty marrow, and fibrous inclusion. When the surgeon encounters softer bone texture, the ability to drill accurately diminishes with the loss of tactile sensitivity. Also, inadvertent over-penetration and over-preparation of soft bone is common. Other factors, such as torqueing of the hand piece and reproducing a consistent angle of penetration, become more demanding as bone density decreases.

Use of the present invention to expand an osteotomy by burnishing helps to maintain all of the existing bone **46** material by pushing the bone aside with minimal trauma while developing an accurately shaped osteotomy **42**. Compare the progressive expansion shown in FIGS. **24A-24D** to note the condensing and compacting cellular structure of the bone **46** as progressively larger osteotomes **22A-C** are introduced. In addition, the osseous layer around the osteotomy **42** is compacted, which will form a denser bone interface with the implant **44** and thus improved retention. This benefit is particularly relevant when there is a marginal quantity of bone **46** to start with.

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Drilling and cutting, by contrast, take bone away from a site. During the drilling process, there is no practical means to immediately improve adjacent bone quality. With the present rotary osteotome technique, the bone layer next to the osteotomy **42** is improved because of the compaction of bone which in turn helps anchor a newly placed implant **44**. Drilling does not improve local anatomy or bone quality. The present osteotome **22** is effective to expand the surrounding bone (e.g. in ridge applications) and improve bone quality. The present osteotome **22** techniques offer a useful and predictable procedure, improved tactile sensitivity, improved control, and improved implant placement in soft bone conditions.

The foregoing invention has been described in accordance with the relevant legal standards, thus the description is exemplary rather than limiting in nature. Variations and modifications to the disclosed embodiment may become apparent to those skilled in the art and fall within the scope of the invention.

What is claimed is:

**1.** A low-impact surgical method for expanding an osteotomy using high-speed rotation, said method comprising the steps of:

providing a rotary osteotome having a tapered working end, the working end having a plurality of longitudinally extending burnishing edges;

positioning the tapered working end of the osteotome over an open end of an osteotomy, the osteotomy having an interior surface surrounded by bone;

rotating the working end of the osteotome at high speed; and

enlarging the osteotomy by axially bouncing the rotating working end within the osteotomy so that the burnishing edges lap against the bone interior surface with downward motion and separate from the interior surface with upward motion in ever deepening movements that cause a progressive plastic deformation of the bone interior surface beginning adjacent the open end and developing downwardly into the osteotomy.

**2.** The surgical method of claim **1**, wherein the working end of the osteotome includes a root shaft, and wherein said

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enlarging step includes maintaining a separation space at all times between the root shaft and the interior surface surrounded by bone.

**3.** The surgical method of claim **2**, wherein a plurality of flutes extend from the root shaft, each said flute extends radially outwardly to a crest defining the major diameter of the osteotome, each burnishing edge disposed along the crest of a respective one of the flutes, and said enlarging step further including manually applying variable axial pressure during said downward motion.

**4.** The surgical method of claim **2**, wherein the plurality of burnishing edges are non-rotatably fixed relative to the root shaft.

**5.** The surgical method of claim **2**, wherein the plurality of burnishing edges are defined by a large negative rake angle.

**6.** The surgical method of claim **1**, wherein said rotating step includes rotating the working end of the osteotome at speeds between about 200-1200 RPM.

**7.** The surgical method of claim **1**, wherein said rotating step includes applying a torque to the working end of the osteotome between about 15-50 Ncm.

**8.** The surgical method of claim **1**, further providing a second larger tapered osteotome having a greater number of burnishing edges than the first osteotome.

**9.** The surgical method of claim **1**, further including installing a fixture portion of an implant into the enlarged osteotomy, wherein said step of installing a fixture portion includes directly engaging an exterior anchoring thread form of the fixture portion into the enlarged osteotomy formed by the plurality of burnishing edges.

**10.** The surgical method of claim **1**, wherein the plurality of burnishing edges each have a spiral twist along the length of the working end.

**11.** The surgical method of claim **1**, wherein the plurality of burnishing edges each have a generally straight configuration along the length of the working end.

**12.** The surgical method of claim **1**, further including the step of preparing an initial osteotomy site by drilling a pilot hole into the bone.

**13.** The method of claim **1**, further including irrigating the osteotomy concurrently with said enlarging step.

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