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40.1 Introduction

The tibial tubercle (interchangeable with tuberosity) is the most distal anchor of the extensor mechanism and can serve as a tool in altering patellofemoral (PF) mechanics. Known collectively as distal realignment procedures, osteotomies of the tibial tubercle are a useful method to treat a variety of PF conditions by allowing coronal, axial, and sagittal plane adjustments of the patellofemoral articulation which redistribute patellar contact pressures (force and contact area) and potentially improve tracking. Numerous tibial tubercle osteotomies have been described in the literature to treat PF pain, chondrosis, and instability. The most notable include medialization, initially described by Roux and later popularized by Elmslie and Trillat, for the treatment of PF instability³⁰ and anteriorization of the tibial tubercle described by Maquet¹⁸ performed to treat PF pain associated with arthritis. Each of these procedures takes advantage of important technical alterations in patellar kinematics. Anteriorization of the tubercle elevates the distal extensor mechanism and serves to shift patellar contact forces proximally, while medialization results in a decrease of the lateral force vector.

In an effort to avoid complications associated with the Maquet procedure, Fulkerson¹¹ designed a tubercle osteotomy known as the anteromedialization (AMZ) technique to address PF pain in conjunction with patellar maltracking. The oblique

nature of the Fulkerson osteotomy allows for simultaneous anteriorization and medialization of the tibial tubercle. By varying the angle of the osteotomy, the tubercle can be biased to a more anterior or more medial position. Since his initial description, the indications for this procedure have evolved significantly and continue to be refined. This has been primarily driven by the evolution and outcomes of patellofemoral resurfacing procedures as well as improved objective measures of patellar alignment, contact area, and forces.

The tibial tuberosity to trochlear groove (TT-TG) distance, popularized by Dejour et al.⁸ as an objective measure of tuberosity position, has helped quantify abnormal tuberosity position and enhanced appropriate candidate identification for all tuberosity osteotomies including the AMZ. This becomes important because patellar contact pressures are very sensitive to distal realignment.^{1,17,25} In addition, combining AMZ with PF cartilage restorative procedures such as autologous chondrocyte implantation and osteoarticular grafting procedures within the PF compartment have demonstrated superior results to either procedure performed independently.^{10,14,19,21,28}

40.2 Indications

When discussing the indications for AMZ it is important to note that as with most patellofemoral surgeries, it should only be performed after the patient has tried and failed nonoperative measures that include a comprehensive “core to the floor”⁹ program of rehabilitation, bracing, and orthotics. Indications for AMZ are primarily based upon mechanical and chondral pathologies specific to each individual knee. Malalignment is a term that has different meanings to

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67 different experts, but for the purposes of this chapter
 68 it simply means alignment that is different from the
 69 average asymptomatic individual. A comprehensive
 70 review by Post et al.²³ demonstrated that the “Q”
 71 angle was inadequate to use as a measure of mala-
 72 lignment of the tibial tuberosity. Using the objectively
 73 measured TT–TG, asymptomatic patients have dis-
 74 tances averaging 13 mm and those with instability
 75 symptoms have average measurements of over
 76 15 mm.²⁷ A panel of patellofemoral experts agreed
 77 that TT–TG distances of over 20 mm were definitely
 78 abnormal and would be potential candidates for mov-
 79 ing the tibial tubercle.¹⁵ Patients with isolated chon-
 80 drosis of the distal or lateral patella, who have excessive
 81 lateral patellar tilt and/or subluxation associated with
 82 an increased TT–TG distance and minimal trochlear
 83 chondrosis are optimal AMZ candidates based on a
 84 retrospective review of AMZ outcomes by Pidori-
 85 ano.²² It has been argued that rotational tuberosity abnor-
 86 malities associated with subjective instability and pain may
 87 be sufficiently treated with straight medialization or
 88 derotation of the tibial tubercle,²⁰ although Pritsch
 89 et al.²⁴ found 80% of 66 patients undergoing tubercle
 90 transfer for patellar instability and pain associated with
 91 maltracking required anteriorization based on intraop-
 92 erative examination. Second, patients who are under-
 93 going PF cartilage restorative procedures have been
 94 shown to benefit from a combined AMZ proce-
 95 dure,^{10,14,19,21,28} where optimization of the biomechan-
 96 ical environment and decreased stress across the
 97 restored cartilage is required. Additionally, in patients
 98 undergoing MPFL repair or reconstruction for recur-
 99 rent lateral patella instability, AMZ may be indicated
 100 only in the setting of a significantly increased TT–TG
 101 distance. However, it should be noted that while this
 102 theoretically decreases the lateral vector forces on the
 103 healing MPFL tissues, there is no randomized study of
 104 AMZ plus MPFL surgery versus MPFL surgery alone
 105 published as of this writing. A summary of AMZ indi-
 106 cations is presented in Table 40.1.

107 40.3 Contraindications

108 Several contraindications to AMZ exist and potential
 109 candidates must be assessed carefully prior to surgery.
 110 Anteromedialization is contraindicated in patients with a
 111 normal TT–TG distance and in patients who have symp-
 112 toms not explained by an increased TT–TG distance.
 113 The condition of the medial PF articulation should be

Table 40.1 Summary of indications for anteromedialization		t1.1
Summary of AMZ indications:		t1.2
• Lateral or distal patella chondrosis with an increased TT–TG distance, excessive lateral tilt/subluxation, and the absence of trochlea chondrosis.		t1.3
• As an adjunct procedure to patellofemoral cartilage restoration in an effort to improve the contact area and decrease PF forces to optimize the biomechanical environment of the new cartilage implant.		t1.4
• Possibly, in conjunction with MPFL repair or reconstruction in patients with markedly increased TT–TG distance.		t1.5
		t1.6
		t1.7
		t1.8
		t1.9
		t1.10
		t1.11

carefully assessed as medialization will significantly
 increase contact pressures between the medial patellar
 facet and trochlea.²⁵ In addition, AMZ is contraindicated
 for proximal patella, panpatella, and bipolar chondrosis
 based upon the outcomes from Pidori-
 ano et al.²²

Advanced chondrosis of the central trochlea has
 been associated with suboptimal results and is con-
 sidered a contraindication to AMZ as an isolated pro-
 cedure.^{5,22} Standard contraindications to any osteotomy
 must also be considered, which includes smoking,
 infection, inflammatory arthropathy, marked osteopo-
 rosis inhibiting adequate fixation, complex regional
 pain syndrome, arthrofibrosis, inability to minimally
 weight-bear, and noncompliant patients. A summary
 of AMZ contraindications is presented in Table 40.2.

40.4 Surgical Technique

Techniques for AMZ have classically been described
 as an isolated procedure; however, AMZ typically
 includes lateral retinacular release or lengthening to
 untether the patella allowing the patellar medialization
 component, and is not uncommonly performed in
 conjunction with procedures such as MPFL repair/
 reconstruction or cartilage restorative procedures.
 These procedures must be taken into consideration
 when planning the surgical approach.

Table 40.2 Summary of contraindications to anteromedialization		t2.1
Summary of contraindications to isolated AMZ:		t2.2
• Normal TT–TG distance		t2.3
• Medial patellofemoral chondrosis (only if not combined with cartilage restoration procedure)		t2.4
• As an isolated procedure, when not combined with cartilage restoration, to treat proximal pole, panpatella, trochlear, or bipolar chondrosis		t2.5
• General contraindications to osteotomy (i.e., smoking, osteoporosis, inflammatory arthropathy)		t2.6
		t2.7
		t2.8
		t2.9
		t2.10

139 **40.4.1 Preoperative Assessment** 140 **and Planning**

141 The desired amount of anteriorization and medializa-
142 tion (based on the objective measurement of the
143 TT–TG distance) must be calculated preoperatively.
144 These two components are considered separately and
145 then basic trigonometric ratios can be used to determine
146 the desired angle for the osteotomy. Anteriorization of
147 between 10 and 15 mm is most commonly recom-
148 mended as it decreases PF stress loads by approxi-
149 mately 20%^{7,8} and results in minimal sagittal rotation
150 of the patella. In regards to the medialization compo-
151 nent, the goal of the osteotomy is to normalize the
152 TT–TG distance, which based on the literature, is
153 within a range of 10–15 mm. By varying the slope and
154 the extent of anteriorization, a variety of medialization
155 distances can be achieved. The required angle can be
156 calculated by the inverse tangent of the desired ante-
157 rior movement divided by the desired medial move-
158 ment Table 40.3. For example, a 60° osteotomy with
159 15 mm of elevation will produce 8.7 mm of medializa-
160 tion, which will normalize most tuberosity positions as
161 it is rare for TT–TG distances of over 25 mm. When
162 more medialization is required, the slope may be
163 decreased; a slope of 45° would move the tubercle
164 15 mm medially with 15 mm of elevation.

165 **40.4.2 Setup and Positioning** 166 **of the Patient**

167 The patient is positioned in the supine position with a
168 side post and a gel-pad under the ipsilateral hemipel-
169 vis. This facilitates an initial arthroscopic evaluation of
170 the knee and limits external rotation of the limb during
171 the osteotomy. All extremities are well padded, a tourni-
172 quet is applied, and prophylactic antibiotics are
173 administered. General, spinal, epidural, or regional
174 block anesthesia can be used depending upon patient
175 and surgeon preference. A thorough examination under

t3.1 **Table 40.3** Reference guide for osteotomy slope

t3.2 Osteotomy	Elevation	Medialization
t3.3 slope (°)	(mm)	(mm)
t3.4 60	15	8.7
t3.5 50	15	12.5
t3.6 45	15	15

176 anesthesia includes assessment of range of motion,
177 patella tracking, and patella displacement. The patient
178 is then prepped and draped in standard fashion.

179 **40.4.3 Arthroscopic Evaluation**

180 Initially, arthroscopic evaluation and documentation of
181 patellofemoral chondrosis is performed. The areas of
182 chondrosis are regionally mapped using the ICRS
183 region knee mapping system noting that significant
184 patellar chondrosis may lead to termination of the pro-
185 cedure unless concomitant cartilage restoration has
186 been planned. Certainly other contraindications may
187 be discovered at arthroscopy and would also halt pro-
188 ceeding with AMZ. At this stage, based on clinical tilt
189 or CT/MRI documented patellar tilt, an arthroscopic
190 lateral release may be performed if indicated. When
191 combined with PF cartilage restoration the lateral
192 release or lateral lengthening is performed in an open
193 manner to allow direct access for performing the carti-
194 lage restoration procedure. Lateral release should
195 allow neutralization of patella tilt and unrestricted cen-
196 tral positioning of the patella relative to the trochlea;
197 however, care must be taken to ensure that medial
198 patella subluxation does not occur. It should be noted
199 that lateral lengthening can maintain control not
200 offered by lateral release.⁴

201 **40.4.4 Incision and Exposure**

202 The longitudinal incision runs approximately 8–10 cm
203 distally beginning at the patellar tendon insertion to
204 the tibial tubercle. The incision can be extended prox-
205 imally to allow adequate exposure if concomitant car-
206 tilage restoration is being performed. The patella
207 tendon is identified and released from capsule medi-
208 ally and laterally to allow protection with a retractor
209 and later tubercle elevation. The lateral incision is
210 extended distally along the lateral margin of the tibial
211 tuberosity and tibial crest allowing subperiosteal ele-
212 vation of the anterior compartment musculature and
213 thereby exposing the lateral wall of the tibia. A cus-
214 tom retractor is positioned at the posterior aspect of
215 the lateral tibia in order to protect the posterior neuro-
216 vascular structures (deep peroneal nerve and anterior
217 tibial artery) (Fig. 40.1).

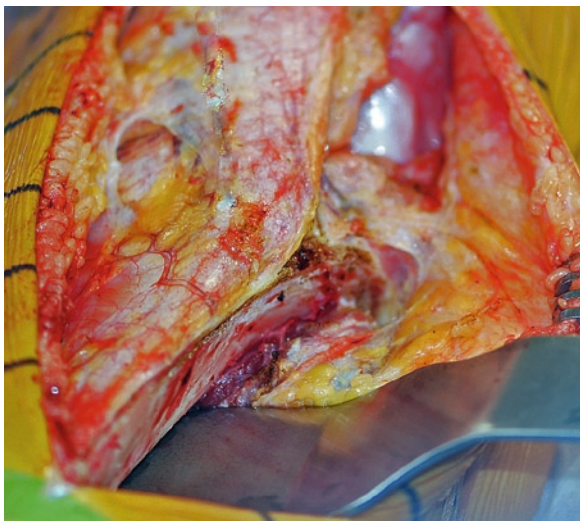


Fig. 40.1 Anterior compartment musculature is elevated from the lateral wall of the tibial with retractor protecting neurovascular structures posteriorly

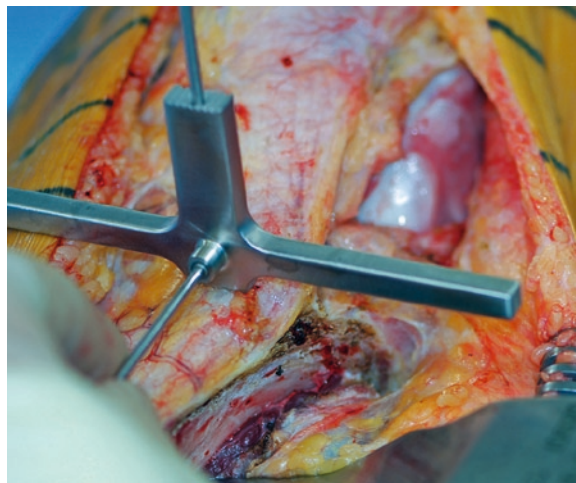


Fig. 40.2 The reference pin guide is orientated so it is perpendicular to the posterior cortex of the tibia

218 **40.4.5 Performing the Osteotomy**

219 For the highly experienced surgeon the osteotomy may
 220 be performed free-hand. Fulkerson originally used an
 221 external fixator pin clamp to direct multiple pins in the
 222 osteotomy plane and then complete it with osteot-
 223 omes.¹¹ Today, there are two commercially available
 224 AMZ osteotomy systems (Tracker, DePuy Mitek, Inc,
 225 Raynham, New Jersey and the T3 System, Arthrex, Inc,
 226 Naples, Florida). The Tracker system was available
 227 first and detailed illustrated surgical techniques using
 228 the jig system have been published by both Fulkerson
 229 and Farr. The T3 system will be used in this section to
 230 illustrate the operative technique; however the approach
 231 for each system and steps following fixation of the cut-
 232 ting guide are similar. For the T3 system, an initial refer-
 233 ence pin is orientated perpendicular to the posterior
 234 cortex of the proximal tibia (Fig. 40.2). The reference
 235 pin is inserted through the pin guide into the tibial
 236 tuberosity, just distal to the patellar tendon attachment
 237 to the tibial tuberosity (Fig. 40.3). Using preoperative
 238 calculations for anteriorization and medialization, the
 239 desired slope angle guide is assembled with the cutting
 240 block and cutting block post. The cutting guide is then
 241 placed over the reference pin and the cutting block is
 242 positioned immediately medial to the tibial crest begin-
 243 ning directly in line with the medial border of the
 244 patella tendon, as it attaches to the tibial tuberosity
 245 (Fig. 40.4), and angled laterally to allow a lateral exit of

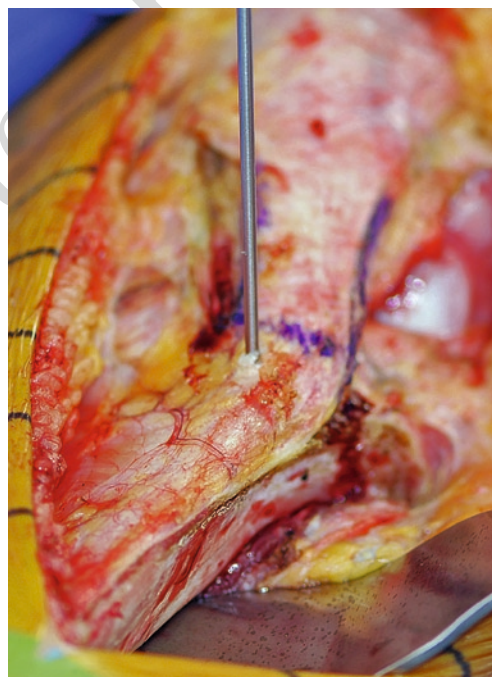


Fig. 40.3 Reference pin is inserted through the guide just distal to Gird's tubercle

the osteotomy distally. For emphasis, the desired 246
 osteotomy forms a triangle shape that tapers distally 247
 allowing an exit through the anterior cortex to the lat- 248
 eral wall of the tibia. The desired pedicle length for the 249
 osteotomy is approximately 7–10 cm. When correct 250
 positioning has been achieved and the entry and exit 251
 sites have been confirmed, two break-away pins secure 252

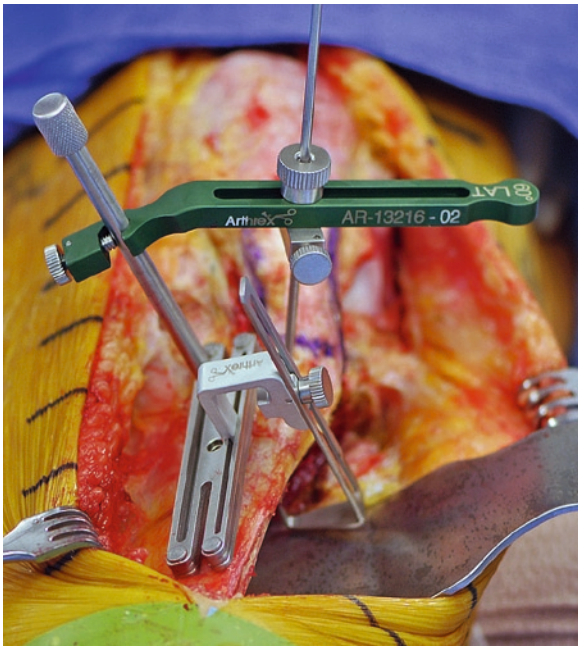


Fig. 40.4 The cutting guide is placed over the reference pin and the cutting block is positioned medial to the patella tendon

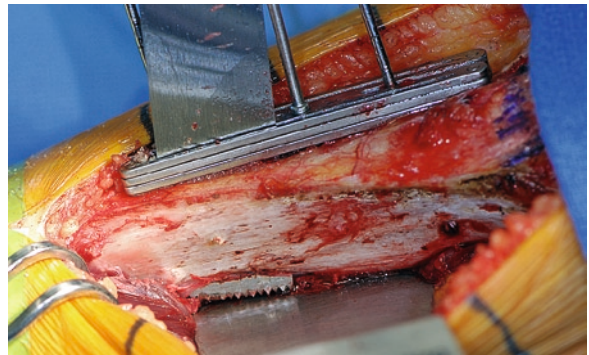


Fig. 40.6 Oscillating saw cooled with saline creates the initial sloped osteotomy, exiting on the protective retractor

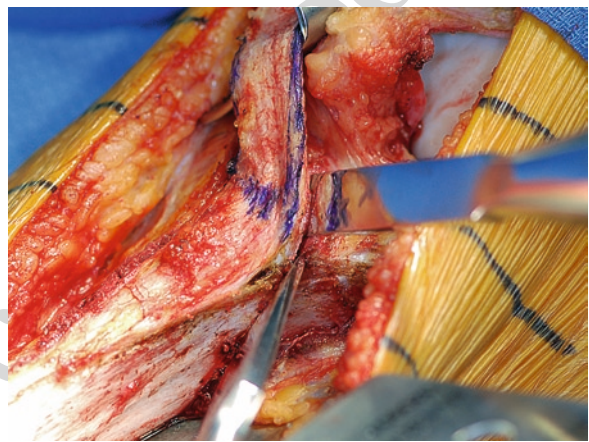


Fig. 40.7 Proximal cuts are completed with small osteotome

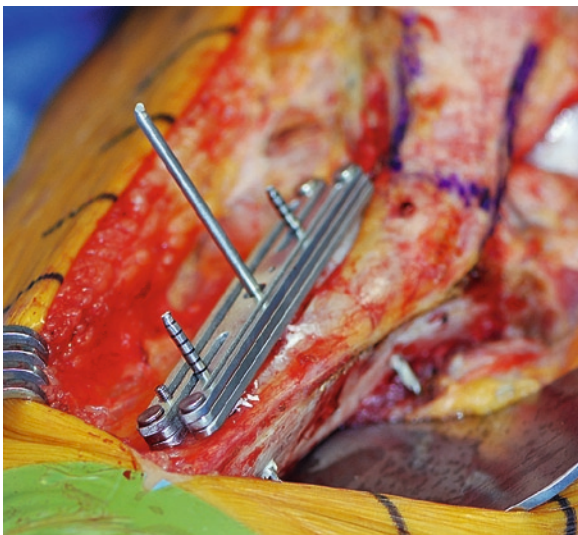


Fig. 40.5 Break-away pins secure the cutting block after positioning is confirmed

253 the cutting block in position (Fig. 40.5). With the retractor still protecting neurovascular structures posteriorly, 254 the cut is made with an oscillating saw which is simultaneously cooled with saline (Fig. 40.6). The cutting 255 block is removed and the oscillating saw is directed toward the distal exit of the osteotomy to finish the distal 256 cut. A small osteotome is used to complete the 257 258 259

proximal osteotomy, approaching the tibial tuberosity 260 medially and laterally at the level of the patella tendon 261 insertion (Fig. 40.7). The tuberosity is now free. 262

40.4.6 Positioning and Fixation

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A ruler is used to measure the required amount of anteriorization and medialization based on preoperative calculations and the pedicle position is adjusted along the osteotomy slope. If required, the pedicles can be moved proximally or distally to address any underlying patella alta or infra. A Kirschner wire is used to temporarily secure the pedicle when correct positioning has been achieved. The tuberosity fragment is then drilled using interfragmentary lag technique and secured using two countersunk 4.5 mm cortical screws (Fig. 40.8). The screws are positioned perpendicular to the osteotomy (angled from the anteriolateral aspect of the pedicle to

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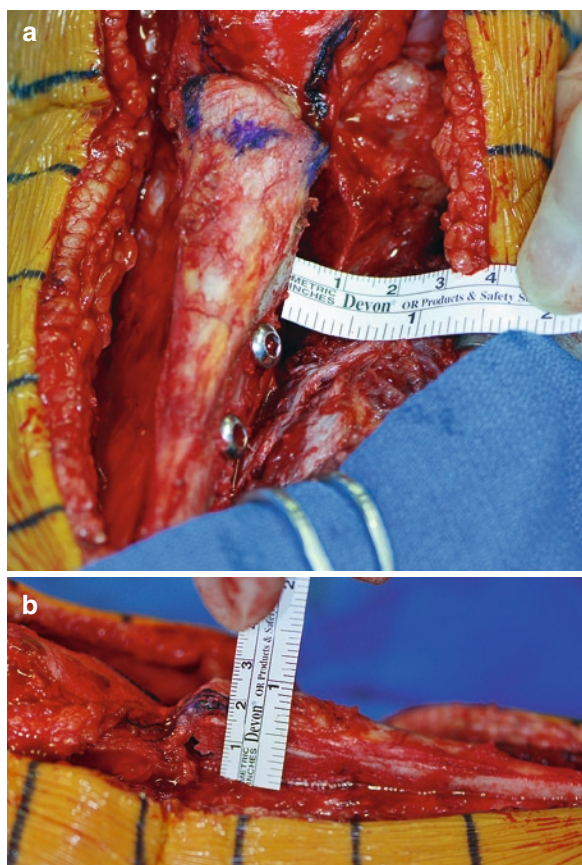


Fig. 40.8 The distance of medialization and anteriorization is measured directly and the pedicle is secured with 2–4.5 mm screws

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276 posteromedial tibia) so they are directed away from pos-
 277 terior neurovascular structures. The surgical site is
 278 closed in a standard fashion.

279 40.5 Pearls and Pitfalls

280 40.5.1 Pearls

- 281 • Preoperative rehabilitation and expectation counsel-
 282 ing is extremely important to prepare the patient
 283 for surgery and recovery.
- 284 • The TT–TG measurement is an objective alterna-
 285 tive to the Q-angle, quantifying the concept of tibial
 286 tuberosity malalignment.
- 287 • The mean TT–TG distance is 13 mm in asymptom-
 288 atic patients and is considered excessive when
 289 above 20 mm.

- The goal is to “normalize” the tibial tubercle posi- 290
 tion that is keeping within a range of 10–15 mm. 291
- The required amount of anteriorization and medial- 292
 ization needed for normalization should be consid- 293
 ered independently. The required osteotomy angle 294
 is determined based upon these values. 295
- The osteotomy angle is equal to \tan^{-1} of the desired 296
 anterior movement (y) divided by the desired medial 297
 movement (x), e.g., $\text{Angle} = \tan^{-1}(y/x)$ (For simplic- 298
 ity, see Table 40.3) 299
- Assessment for patella alta using the Caton– 300
 Deschamps ratio (normal range 0.8–1.2) is required 301
 to determine if distalization is required. 302
- Strengthening of proximal core muscles must be a 303
 focus of rehabilitation in conjunction with local 304
 musculature. 305
- Anteromedialization can be performed in conjunc- 306
 tion with other procedures including lateral release/ 307
 lateral lengthening, MPFL repair or reconstruction, 308
 or cartilage restoration procedures. 309

40.5.2 Pitfalls

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- Over medialization of the tibial tubercle can be det- 311
 rimental secondary to increased medial patellofem- 312
 oral and tibiofemoral stress. 313
- Patients should be aware that pain over the screw 314
 site is common and they may need removal at a 315
 future date. 316
- Weight bearing too early can lead to a fracture 317
 of the proximal tibia if the patient is returned 318
 to full weight bearing prior to radiographic 319
 healing.^{2,12,29} 320
- The MPFL is recognized as the key restraint to lat- 321
 eral patella dislocation. Isolated tibial tuberosity 322
 AMZ is not a substitute for MPFL repair or 323
 reconstruction. 324
- Excessive anteriorization of the tuberosity can lead 325
 to skin healing problems and can cause clinically 326
 significant sagittal plane rotation of the patella alter- 327
 ing contact areas. 328
- Isolated AMZ performed in the presence of chon- 329
 drosis will yield poor results when the wear patterns 330
 are located in the: proximal patella, panpatella, or 331
 trochlea. However, AMZ in conjunction with carti- 332
 lage restoration procedures in these regions can 333
 achieve good results. 334

40.6 Complications

Potential complications include those generally associated with osteotomies of the lower limb. General complications include malunion, nonunion, fracture at the osteotomy site,^{12,29} venous-thromboembolism, compartment syndrome, infection, and loss of fixation. Complications specific to AMZ include persistent pain, arthrofibrosis and stiffness, progressive chondral deterioration, symptomatic hardware, complex regional pain syndrome, and intraoperative injury to the neurovascular structures including the popliteal artery and its trifurcation¹⁶ and the deep peroneal nerve.

40.7 Postoperative Management

To improve postoperative recovery and prepare for surgery, the patient should undergo a preoperative proximal core and kinetic chain strengthening program (lower back, pelvis, hip thigh, and leg). Postoperatively the patient is treated with standard compression dressings, protective bracing, and cryotherapy, and is monitored for immediate complications. For the first 6 weeks the patient is limited to touch weight bearing with crutches and begins transitioning to full weight bearing after radiographs are noted to be acceptable at 6 weeks. The knee is

protected with a hinged knee brace in extension which is unlocked at 2 weeks and discontinued when there is adequate lower extremity control (usually by 8 weeks). Early core proximal strengthening, quadriceps strengthening, and knee range of motion exercises are essential and a close relationship with an experienced physical therapist is key to optimizing the final results. The safe range of motion may need to be modified throughout the rehabilitation process to accommodate for concomitant cartilage restorative procedures.

40.8 Conclusions

Multiple case series have reported outcomes of the AMZ procedures (Table 40.4). Despite the heterogeneity in outcome measurements, results demonstrate high percentages of excellent and good results and improvements in objective, subjective, and functional measures. Attention to details related to surgical planning and properly managing patient expectations is most likely to lead to good or excellent results. Newer techniques (i.e., the T3 system) allow the surgeon to objectively determine the inclination of the osteotomy to properly restore patellofemoral mechanics based upon the preoperative planning.

Table 40.4 Anteromedialization outcomes

Author, year	Patient number	Mean follow-up (range)	Reported outcomes	
Fulkerson ¹¹	8	n/a	Substantial relief of pain and disability for all patients	
Cameron et al. ⁶	53	>12 months	66% Excellent, 16% good, 11% fair, 7% poor	
Fulkerson et al. ¹³	30	35 months (26–50)	35% Excellent, 54% good or very good, 4% fair, 7% poor	
Sakai et al. ²⁶	21	5 years (2–13)	Pain relief in ascending and descending stairs for 20/21	
Pidoriano et al. ²²	37	47 months (12–96)	87% Good to excellent results with lateral or distal lesions, 55% good to excellent results with medial lesions, 20% good to excellent results with proximal or diffuse lesions	t4.8 t4.9 t4.10
Bellemans et al. ³	29	32 months (25–44)	Significant improvements in mean Lysholm (62 preoperative, 92 postoperative, $p < 0.001$) and Kujala scores (43 preoperative, 89 postoperative, $p < 0.001$)	t4.11 t4.12 t4.13
Buuck and Fulkerson ⁵	42	8.2 years (4–12)	86% Good to excellent subjectively, 86% good to excellent on clinical examination	t4.14 t4.15

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Author Queries

Chapter No.: 40

Query	Details Required	Author's Response
AU1	Please check if the chapter title is correct. Chapter title in the table of contents is different.	
AU2	Please confirm the corresponding author and also confirm the affiliation details.	
AU3	Please provide part captions for part figures "a" and "b".	
AU4	Please check if the edit to the sentence starting "The required....." is OK.	
AU5	Please provide complete details for Ref. [15].	